Statewide Management, Accounting and Reporting Tool

Statewide Human Resource and Payroll System

Activity Guide –

RP301: Ad Hoc Business Intelligence Reporting

State of Kansas

TABLE OF CONTENTS

Activity 1 - Walkthrough: Viewing Saved Requests

Scenario
In this scenario, you are planning to review a request created by another Power User. The request has been saved to the “Training” folder within the “Shared Folders” structure. You need to find the request and run it to evaluate the current results.

Job Aid
Not Applicable

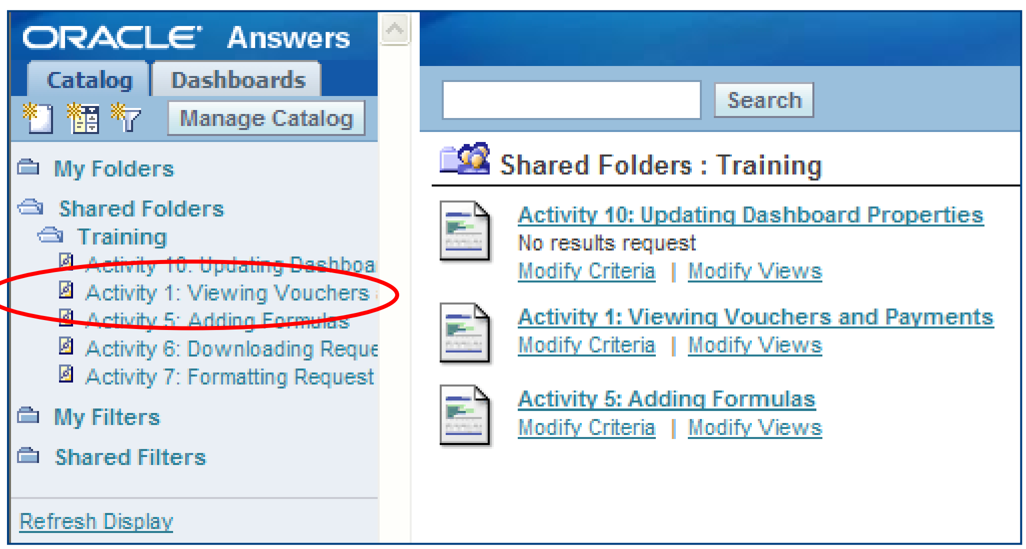
Instructions
Follow along with your instructor as he/she demonstrates how to run an existing request.

Detailed Steps

1. Click the **Answers** link to return to the start page for Answers

2. Locate and expand the **Training** folder in the selection pane under the **Shared Folders** structure

3. Click the request titled “**Activity 1: Viewing Vouchers and Payments**” to view the results



Activity 2 - Walkthrough: Creating and Saving Requests

Scenario 1
In this scenario, one of your agency's department managers has asked you to create a basic request to review payments made against vouchers. Use the fact and dimension columns from the FMS – AP – Vouchers and Payments subject area to create your request.

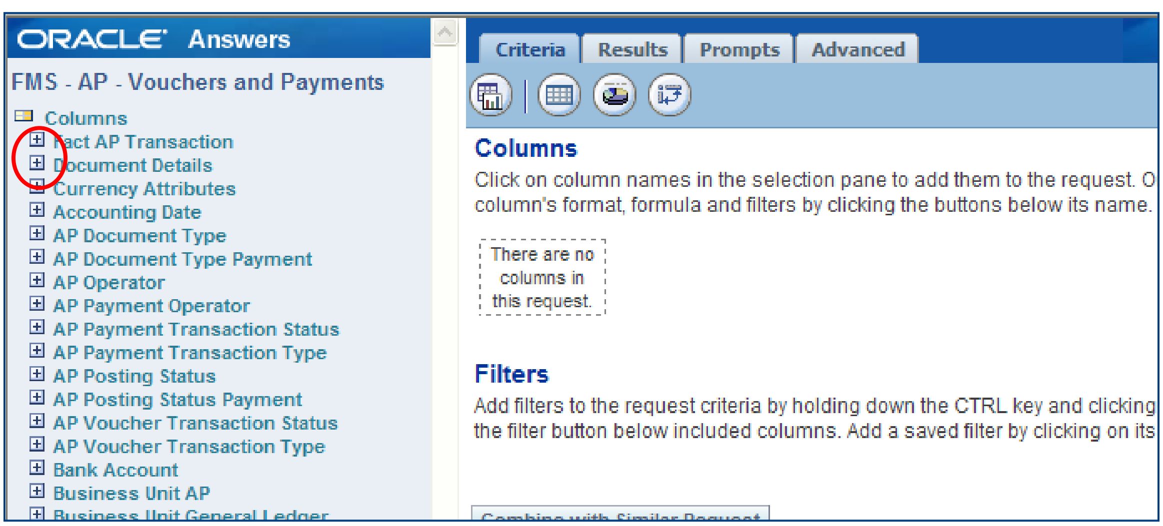
Scenario 2
After creating the request, you decide to change the order in which the data is displayed. Update the column order and then save your request for use in a later activity.

Job Aid
Not Applicable

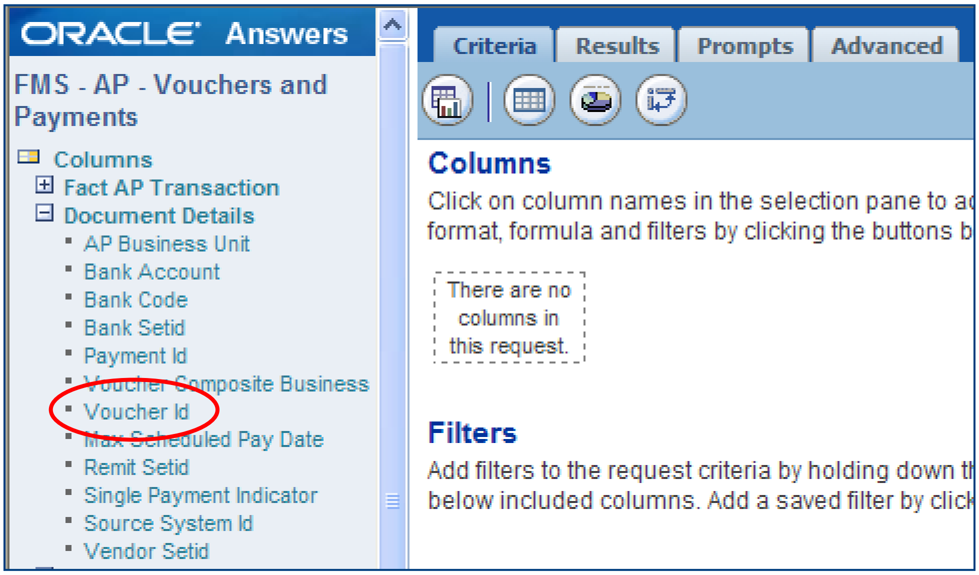
Instructions
Follow along with your instructor as he/she demonstrates how to create and save a basic request.

Detailed Steps – Scenario 1: Create the Request

1. Click the **Answers** link to return to the start page for Answers
2. Click on the **FMS – AP – Vouchers and Payments** subject area to view the available Fact and Dimension columns.
3. In order to select a column, you need to expand the Fact or Dimension. From the selection pane, click the **Plus** icon ( ) next to the **Document Details** dimension

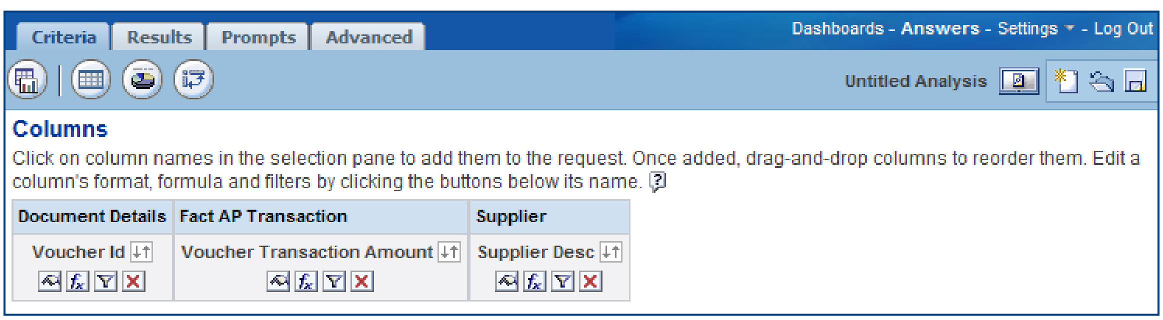


4. Click on the **Voucher Id** column to add it to your request



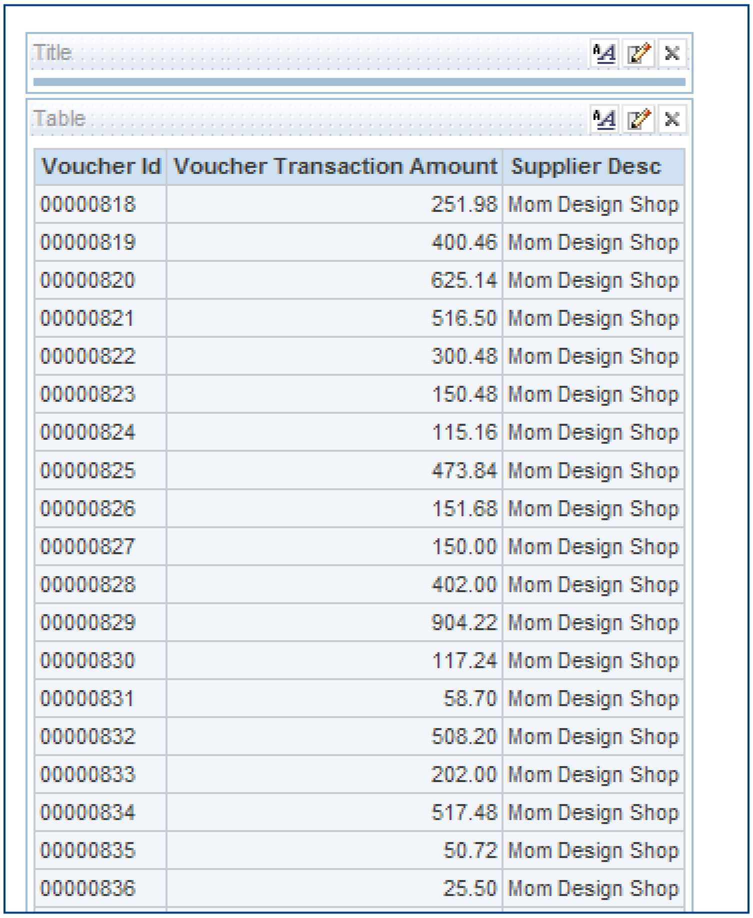
5. Expand the **Fact AP Transaction** fact and select the **Voucher Transaction Amount** column

6. Expand the **Supplier** dimension and select the **Supplier Desc** column. Your screen should now look like the picture below:



7. Click the **Results** tab to run your request

   Note: You can also click the **Display Results** button.



Title

Table

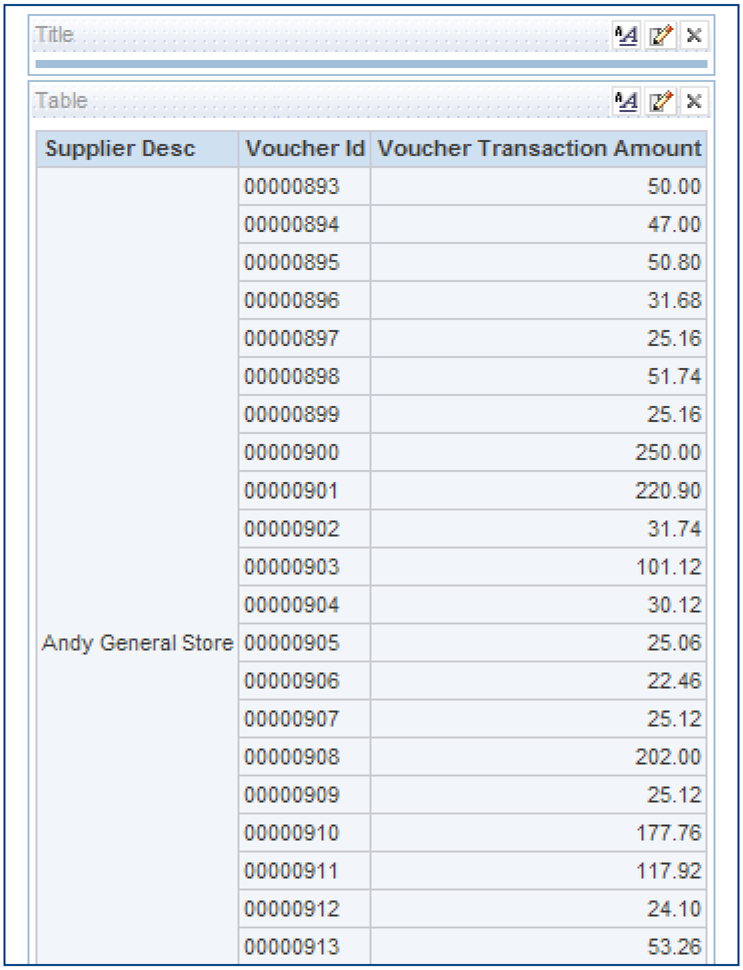
Voucher Id	Voucher Transaction Amount	Supplier Desc
00000818	251.98	Mom Design Shop
00000819	400.46	Mom Design Shop
00000820	625.14	Mom Design Shop
00000821	516.50	Mom Design Shop
00000822	300.48	Mom Design Shop
00000823	150.48	Mom Design Shop
00000824	115.16	Mom Design Shop
00000825	473.84	Mom Design Shop
00000826	151.68	Mom Design Shop
00000827	150.00	Mom Design Shop
00000828	402.00	Mom Design Shop
00000829	904.22	Mom Design Shop
00000830	117.24	Mom Design Shop
00000831	58.70	Mom Design Shop
00000832	508.20	Mom Design Shop
00000833	202.00	Mom Design Shop
00000834	517.48	Mom Design Shop
00000835	50.72	Mom Design Shop
00000836	25.50	Mom Design Shop

Detailed Steps – Scenario 2: Update and Save the Request

8. Click the **Criteria** tab

9. You can reorder the columns in your request by clicking and dragging them. Click on the **Supplier Desc** column and drag it in to the left of the **Voucher Id** column.

10. Click the **Results** tab. Notice that the display is now updated based on moving your columns.



Title

Table

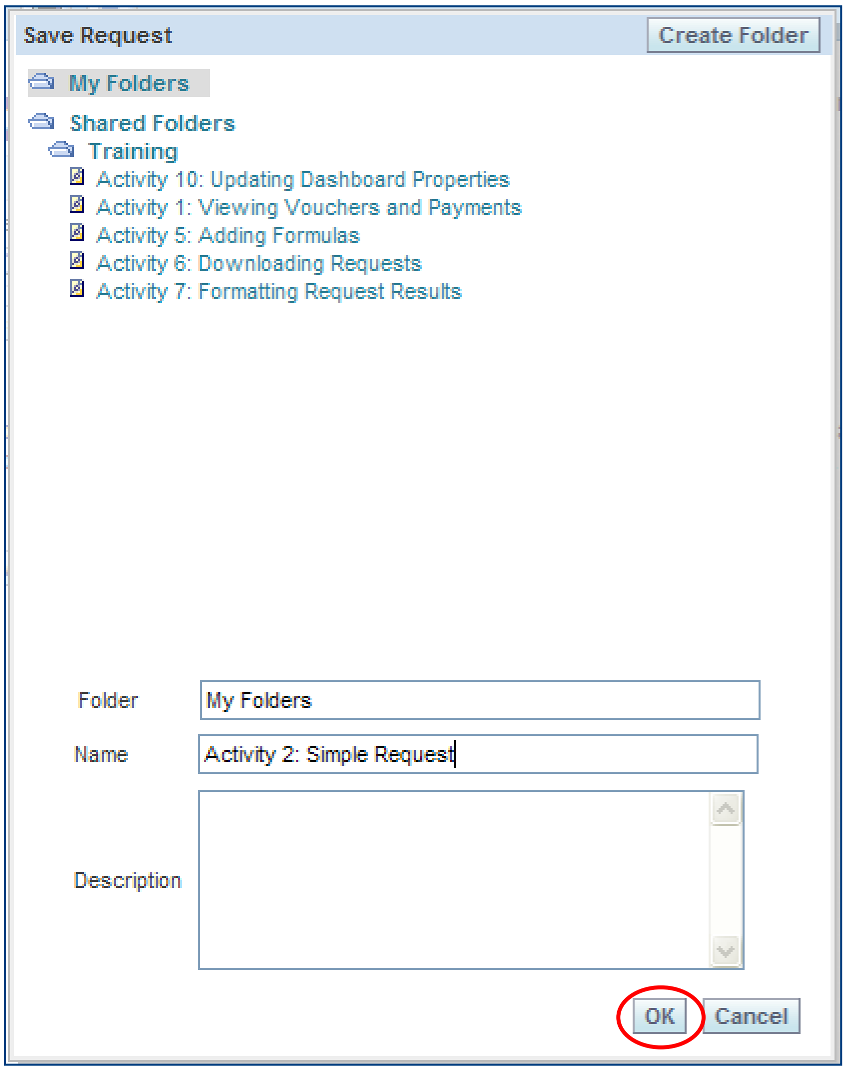
Supplier Desc	Voucher Id	Voucher Transaction Amount
Andy General Store	00000893	50.00
	00000894	47.00
	00000895	50.80
	00000896	31.68
	00000897	25.16
	00000898	51.74
	00000899	25.16
	00000900	250.00
	00000901	220.90
	00000902	31.74
	00000903	101.12
	00000904	30.12
	00000905	25.06
	00000906	22.46
	00000907	25.12
	00000908	202.00
	00000909	25.12
	00000910	177.76
	00000911	117.92
	00000912	24.10
	00000913	53.26

11. Click the **Save Request** button ( )

12. In the **Save Request** window, select the **My Folders** folder structure so the “My Folders” label appears in the **Folder** field

13. Click in the **Name** field and enter “**Activity 2: Simple Request**”

    Note: Be sure to save the request. This request will be used as the basis for a future activity.



14. Click the **OK** button.

Activity 3 - Walkthrough: Ordering Request Results and Using Request Views

Scenario 1
In this scenario, your boss has reviewed the basic request, Activity 2: Simple Request, which you put together. They ask you to add a date to your request and sort the date in ascending order.

Scenario 2
After updating the request, you decide to display the results as both a table and a chart. Use the **Chart** button ( ) to add a bar chart to your request results and display the results by date.

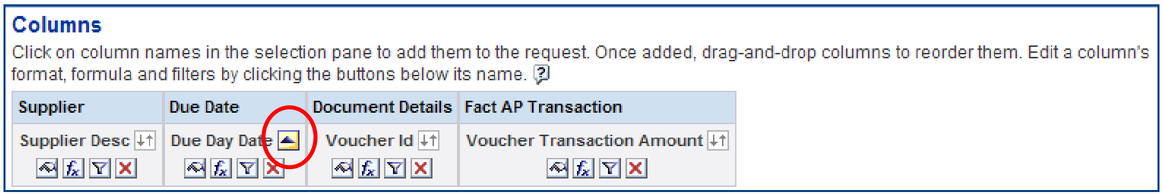
Job Aid
Not Applicable

Instructions
Follow along with your instructor as he/she demonstrates how to create a new view of a request and order the results.

Detailed Steps – Scenario 1: Ordering Request Results

1. Click the **Answers** link to return to the start page for Answers
2. Locate and expand the **My Folders** structure in the selection pane
3. Click the request titled "**Activity 2: Simple Request**". When you select a request name, the results automatically display.
4. Click the **Modify** button in order to make changes to the request
5. Expand the **Due Date** dimension and select the **Due Day Date** column
6. Drag the **Due Day Date** column so that it is between the **Supplier Desc** and **Voucher Id** column
7. Click the **Order By** button ( ) on the **Due Day Date** column

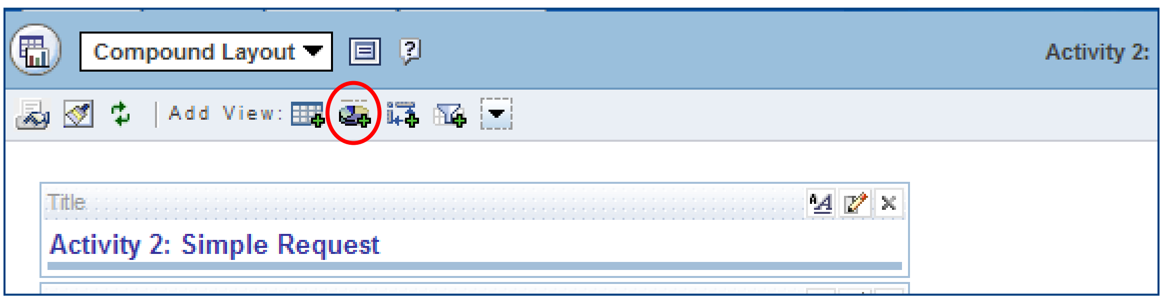
   Note: The button should change from the image of two arrows – one pointing up, the other pointing down ( ) – to the image of an up arrow ( ). This indicates that the vouchers will be sorted in ascending order by the **Due Day Date** column.



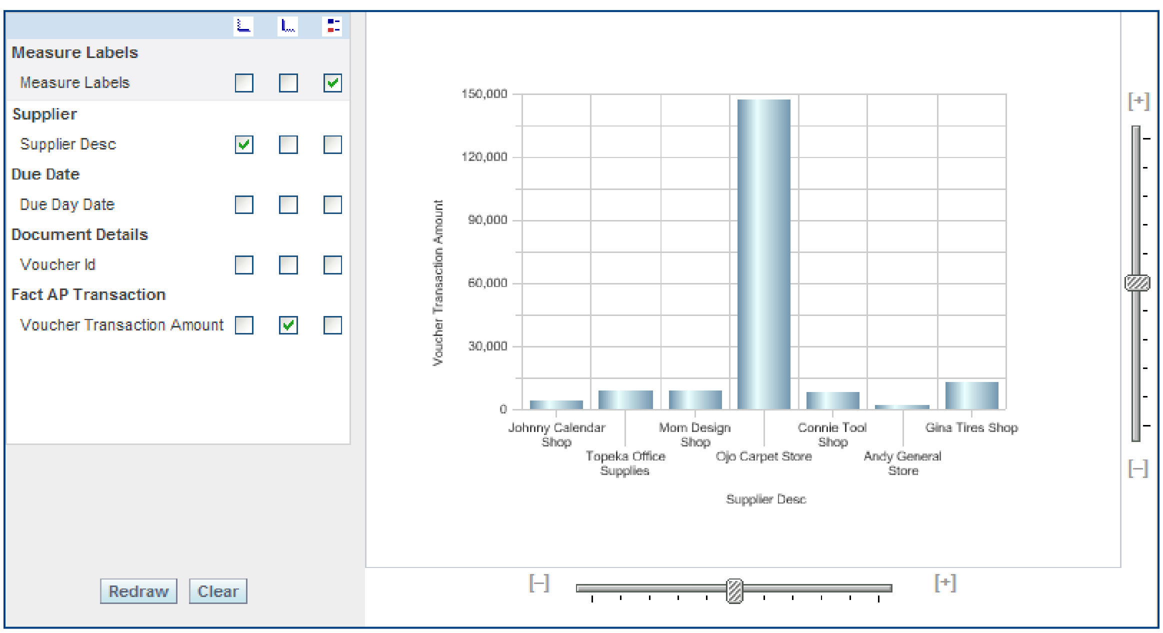
8. Click the **Results** tab

Detailed Steps – Scenario 2: Using Request Views

9. Click the **Chart** button ( )

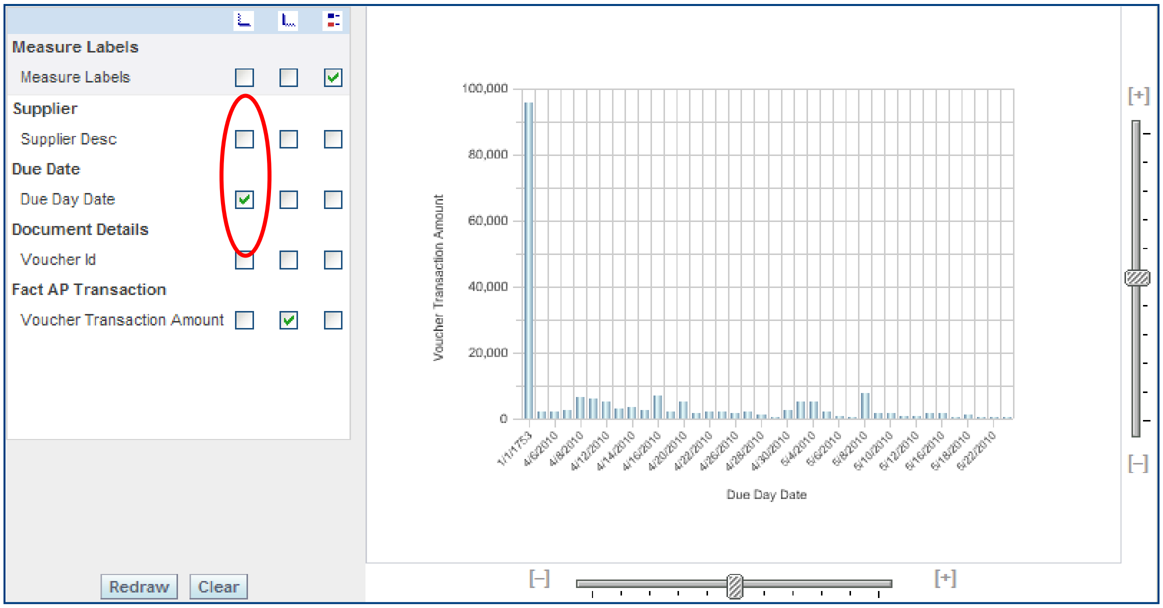


10. The default chart is drawn based on the first column, Supplier Desc



11. To display the amounts paid by date, deselect the **Supplier Desc** checkbox in the first column and select the **Due Day Date** checkbox in the first column

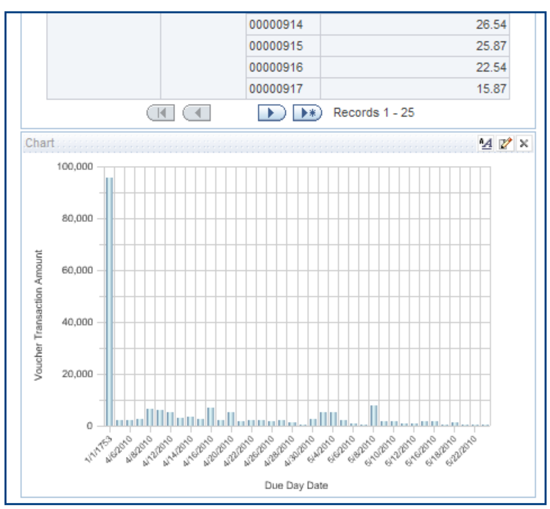
12. Click the **Redraw** button



13. Click the **OK** button and the **Chart** view is added to your request results

Note: If the **OK** button does not appear, click the **Choose a result view** drop-down list and select the **Compound Layout** option.

Hint: You may need to scroll down the **Workspace** to see the chart beneath the table.

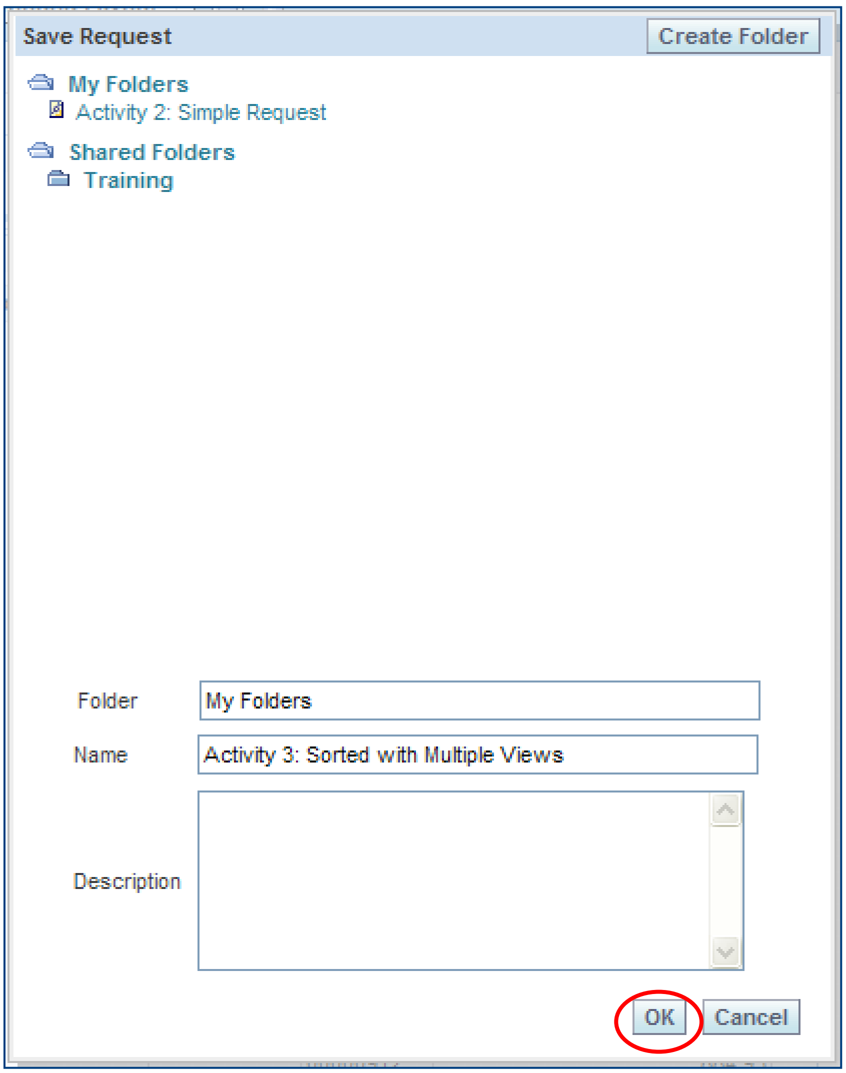


15. Click the **Save Request** button ( )

16. In the **Save Request** window, select the **My Folders** folder structure so the "My Folders" label appears in the **Folder** field

17. Click in the **Name** field and enter "**Activity 3: Sorted with Multiple Views**"

    Note: Be sure to save the request. This request will be used as the basis for a future activity.



14. Click the **OK** button.

Activity 4 - Walkthrough: Adding Filters and Totals

Scenario 1
In this scenario, your boss distributed the request you created, Activity 3: Sorted with Multiple Views to your agency's management team. The management team has decided they want this to become a monthly report. Therefore, you need to add a filter to limit the results to just the month of April.

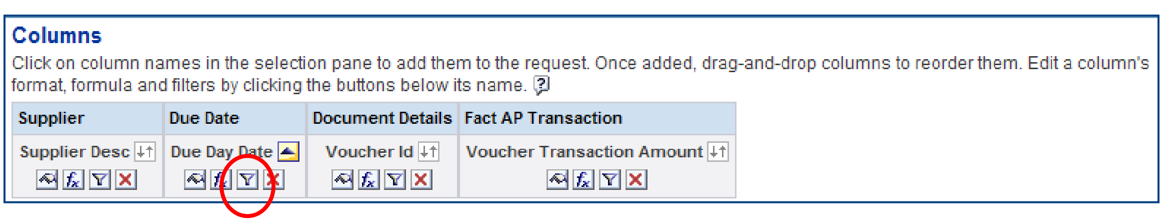
Scenario 2
The management team has also asked for totals by each date as well as for the entire month. For this scenario, use the month of April and add totals to your table by day and a grand total for the month. After making all the updates, re-run the results and view the updated table in your request.

Job Aid
Not Applicable

Instructions
Follow along with your instructor as he/she demonstrates how to add totals and filters.

Detailed Steps – Scenario 1: Adding Filters

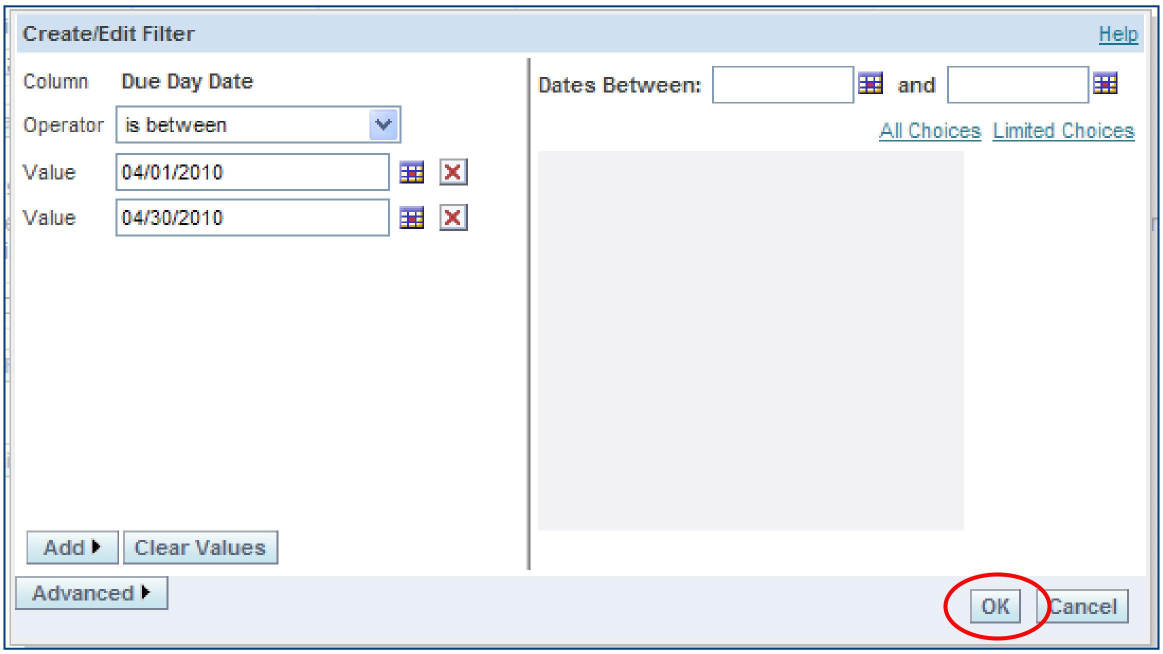
1. Click the **Oracle Answers** header in the selection pane to return to the start page for Answers
2. Locate and expand the **My Folders** structure in the selection pane
3. Click the request titled "**Activity 3: Sorted with Multiple Views**"
4. Click the **Modify** button
5. In order to limit the results to just the month of April, you must add a filter to the **Due Day Date** column. Click on the **Filter** button ( ) in the **Due Day Date** column.



6. For this scenario, you need to limit your results to the month of April. Begin by changing the **Operator** field to “is between”.

7. Enter the begin and end dates for April, 2010 (i.e. April 1 – April 30, 2010) in the **Value** fields

   Hint: You can use the **Calendar** button ( ) to look up and select the desired date for each of the **Value** fields.



8. Click the **OK** button

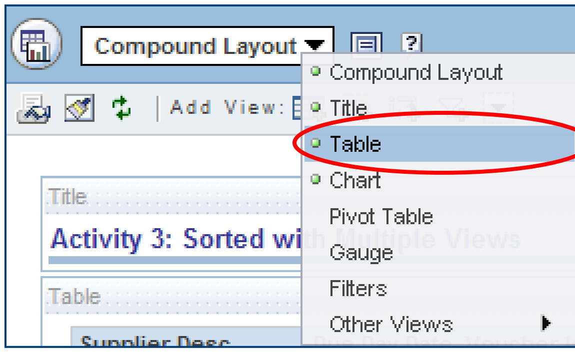
9. Click the **Display Results** button to verify that your results are now only for the vouchers with April, 2010 dates

   Hint: Click the **All Pages** button ( ) at the bottom of the table to display all of the results.

10. Notice that your results have defaulted to the **Compound Layout** view. This is because a default title is always added to your request when you run it.

Detailed Steps – Scenario 2: Adding Totals

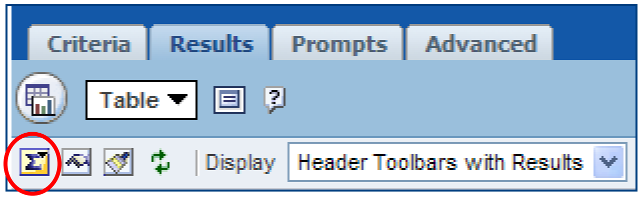
11. In order to add subtotals, you must be in the **Table** view. Click the **Choose a result view** drop-down list and change the view from the **Compound Layout** view to the **Table** view.



12. Click the **Totals** button ( ) above the **Due Day Date** column to add subtotals of the voucher transaction amount by date to the table

Supplier Desc	Due Day Date	Voucher Id	Voucher Transaction Amount
Mom Design Shop		00000818	125.99
Johnny Calendar Shop		00000918	120.00
Ojo Carpet Store		00000949	1200.36
Gina Tires Shop	4/5/2010	00000868	275.84
Topeka Office Supplies		00000982	59.63
Connie Tool Shop		00000843	159.75
Andy General Store		00000893	25.00
	4/5/2010 Total		**1966.57**
Mom Design Shop		00000819	200.23
Johnny Calendar Shop		00000919	40.25
Andy General Store		00000894	23.50
Ojo Carpet Store	4/6/2010	00000950	1520.55
Gina Tires Shop		00000869	101.00
Connie Tool Shop		00000844	159.75
Topeka Office Supplies		00000983	78.00
	4/6/2010 Total		**2123.28**

13. Click the **Totals** button ( ) on the header toolbar to add a grand total of the voucher transaction amount to the table



14. Use the navigation buttons ( ) at the bottom of your results tables to view the **Grand Total**

    Hint: Click the **Next Page** button ( ) until you reach the end of the results or click the **All Pages** button ( ) and scroll to the bottom of your table

Topeka Office Supplies		00001000	44.55
	4/29/2010 Total		**621.29**
Mom Design Shop	4/30/2010	00000837	588.65
Connie Tool Shop		00000862	159.75
Gina Tires Shop		00000887	213.48
Johnny Calendar Shop		00000937	25.34
Andy General Store		00000912	12.05
Ojo Carpet Store		00000968	1587.52
Topeka Office Supplies		00001001	45.25
	4/30/2010 Total		**2632.04**
Grand Total			**62454.61**
	Records 1 - 140 (All Records)		

Activity 5 - Walkthrough: Adding Formulas

Scenario

After reviewing a request that you created recently, your boss has asked you to add a column showing the average amount of all of the vouchers on the report.

Job Aid

Not Applicable

Instructions

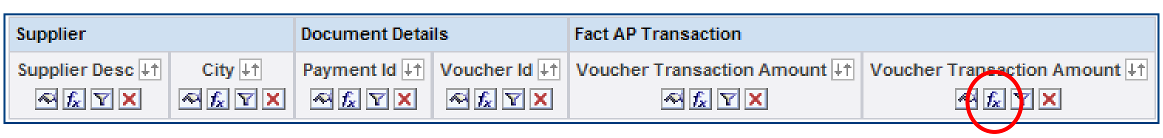
Follow along with your instructor as he/she demonstrates how to add formulas.

Detailed Steps

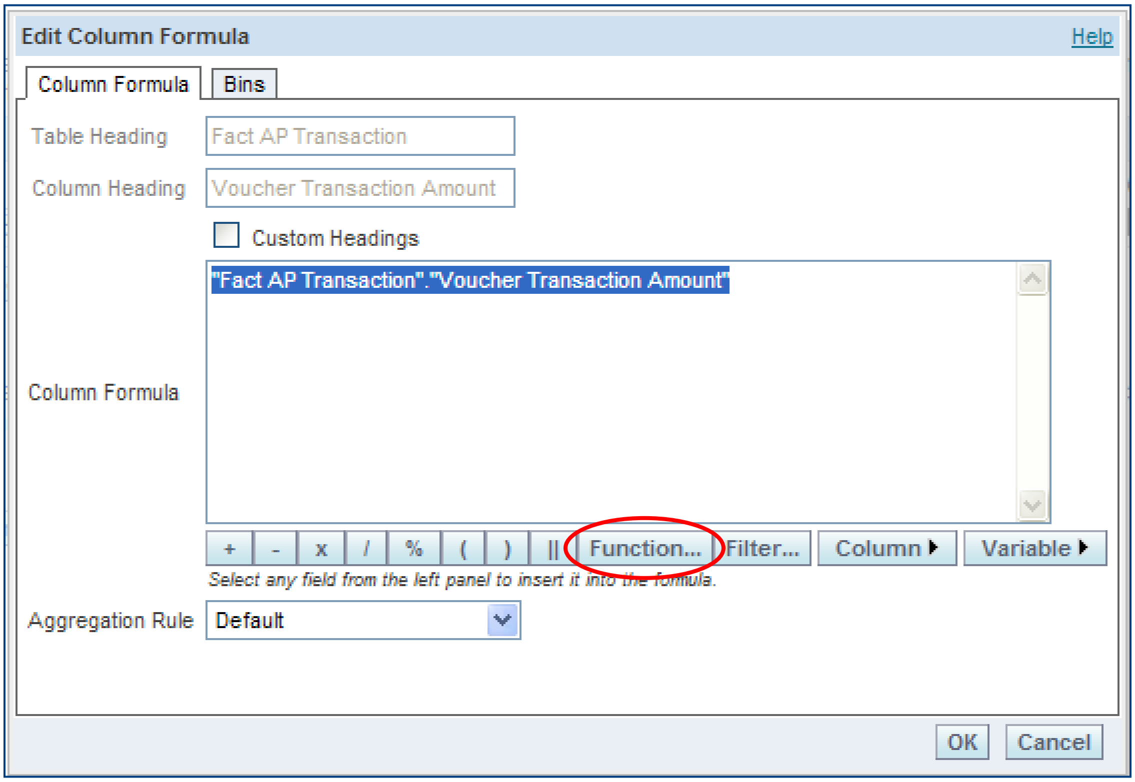
1. Click the **Oracle Answers** header in the selection pane to return to the start page for Answers
2. Locate and expand the **Training** folder in the selection pane under the **Shared Folders** structure
3. Click the request titled "**Activity 5: Adding Formulas**"
4. Click the **Modify** button
5. Expand the **Fact AP Transaction** fact and select the **Voucher Transaction Amount** column

   Note: You are adding a second column of the same fact so that one will show the base value and the other will show the average.

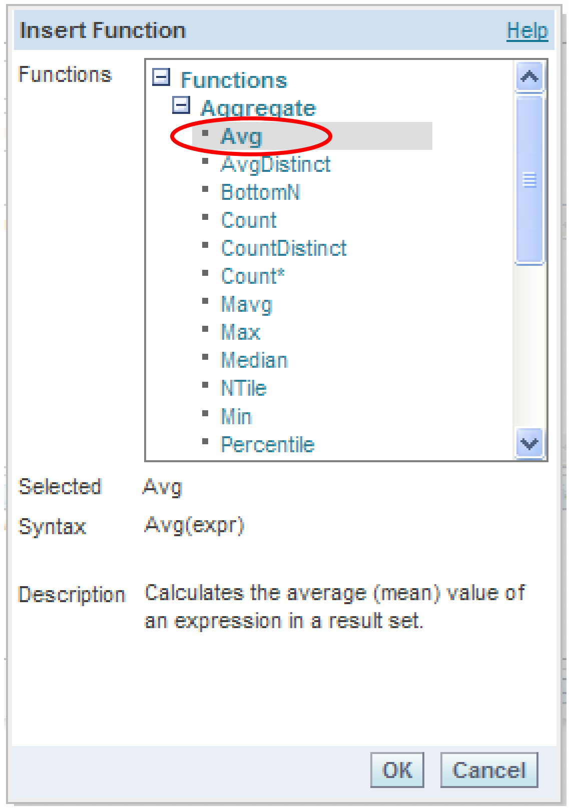
6. Click the **Formula** button (f_x) on the second Voucher Transaction Amount column



7. Click the **Function** button to display the available functions.



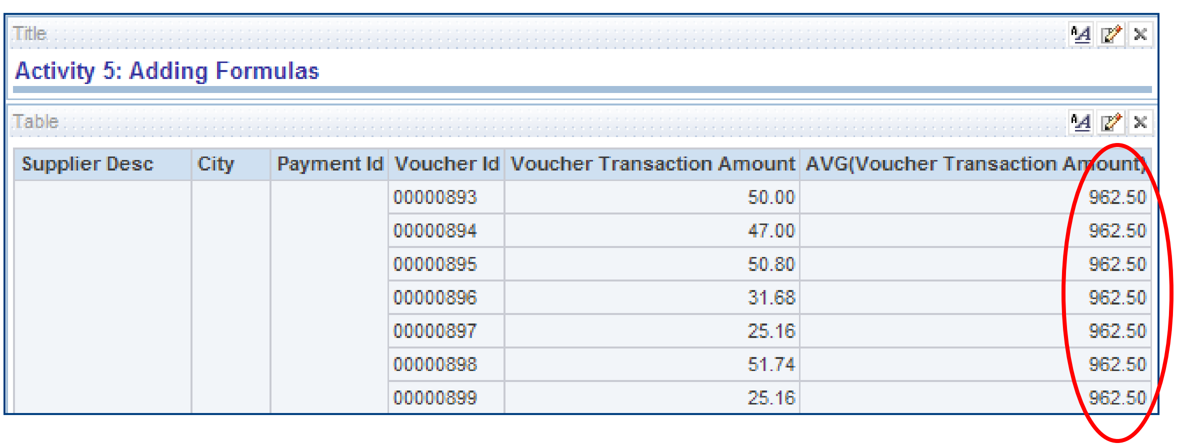
8. Expand the **Aggregate** function section and choose the **Avg** function



9. Click the **OK** button.

10. The formula is now displayed in the **Column Formula** field of the **Edit Column Formula** window. Click the **OK** button.

11. Click the **Display Results** button. The average amount of all vouchers on the request is now displayed in the last column.


Title

Activity 5: Adding Formulas

Table

Supplier Desc	City	Payment Id	Voucher Id	Voucher Transaction Amount	AVG(Voucher Transaction Amount)
			00000893	50.00	962.50
			00000894	47.00	962.50
			00000895	50.80	962.50
			00000896	31.68	962.50
			00000897	25.16	962.50
			00000898	51.74	962.50
			00000899	25.16	962.50

Activity 6 - Walkthrough: Downloading Requests

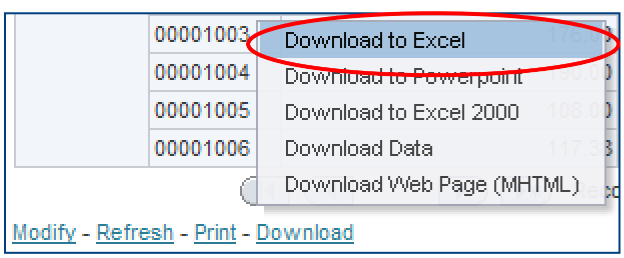
Scenario
In this scenario, the data from one of your requests is used as part of an agency report created outside of the data warehouse. You need to download the results from your request to Excel so that you can merge the information with other information.

Job Aid
Not Applicable

Instructions
Follow along with your instructor as he/she demonstrates how to add download requests.

Detailed Steps

1. Click the **Oracle Answers** header in the selection pane to return to the start page for Answers
2. Locate and expand the **Training** folder in the selection pane under the **Shared Folders** structure
3. Click the request titled "**Activity 6: Downloading Requests**"
4. Scroll to the bottom of the page and click the **Download** link
5. Choose the **Download to Excel** option from the pop-up menu



6. Click the **Open** button in the **File Download** window to open the results in Excel.

   Note: You can also click the **Save** button to save the results.

Activity 7 - Walkthrough: Formatting Request Results

Scenario

In this scenario, you have been asked by one of the managers that you support to update the formatting on a request. The manager wants to see more prominent headers for the **Vendor** column on the request. The manager has also requested that the voucher transaction amount be formatted as currency with the dollar symbol, show amounts to two (2) decimal places, and use the 1000s separator.

Job Aid

Not Applicable

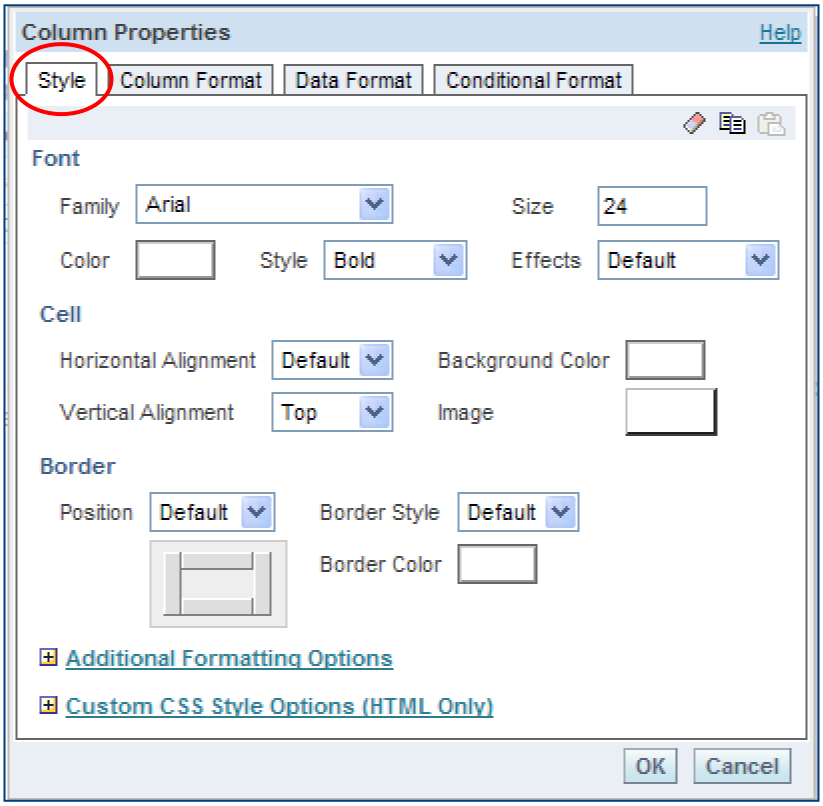
Instructions

Follow along with your instructor as he/she demonstrates how to format request results.

Detailed Steps

1. Click the **Oracle Answers** header in the selection pane to return to the start page for Answers
2. Locate and expand the **Training** folder in the selection pane under the **Shared Folders** structure
3. Click the request titled "**Activity 7: Formatting Request Results**"
4. Click the **Modify** button
5. Click the **Column Properties** button ( )for the **Supplier Desc** column

6. Use the **Style** tab of the **Column Properties** window to update the look and feel of the text in this column
7. Set the **Family** field to "**Arial**"
8. Set the **Size** field to "**24**"
9. Set the **Style** field to "**Bold**"
10. Set the **Vertical Alignment** field to "**Top**"

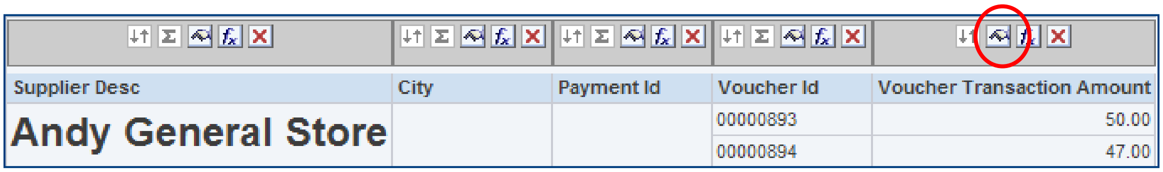


11. Click the **OK** button

12. Click the **Display Results** button to view your changes

13. Remember that in order to edit the columns directly from the results, you must use the **Table** view. Click the **Choose a result view** drop-down list and change the view from the **Compound Layout** view to the **Table** view to edit column properties directly from this **Results** tab.

14. Click the **Column Properties** button ( ) for the **Voucher Transaction Amount** column



15. Click the **Data Format** tab in order to change the appearance of the amounts in the **Voucher Transaction Amount** column

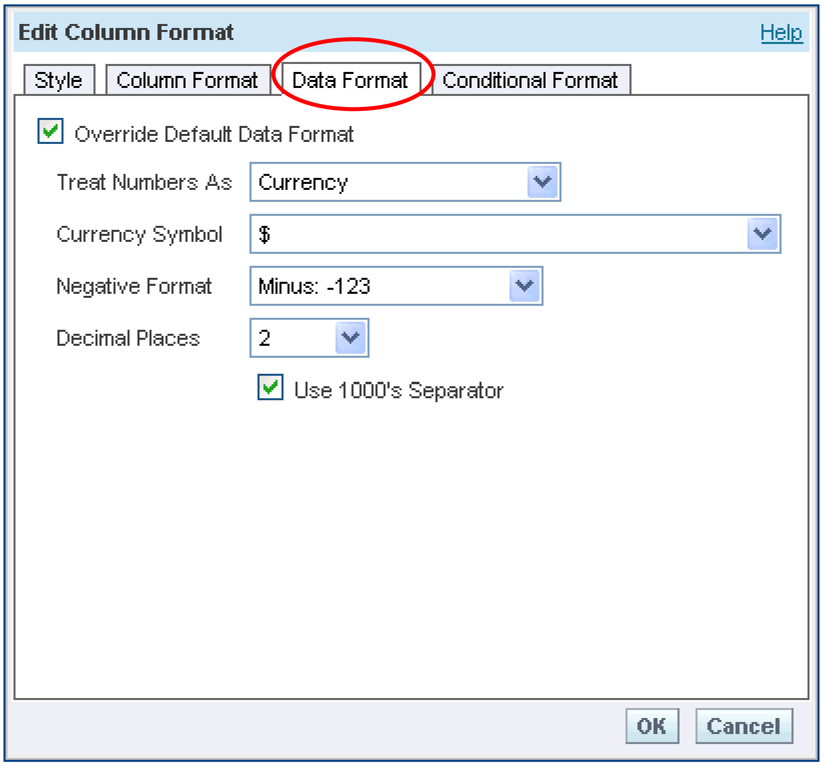
16. Click the **Override Default Data Format** checkbox to make the remaining fields in the dialog box available for changes

17. Set the **Treat Number As** field to "**Currency**"

18. Set the **Currency Symbol** field "**$**"

19. Set the **Decimal Places** field to "**2**"

20. Select the **Use 1000's Separator** checkbox



21. Click the **OK** button. Since you are working from the **Results** tab, the request automatically updates with the new formatting.

Activity 8 - Walkthrough: Working with Combined Filters

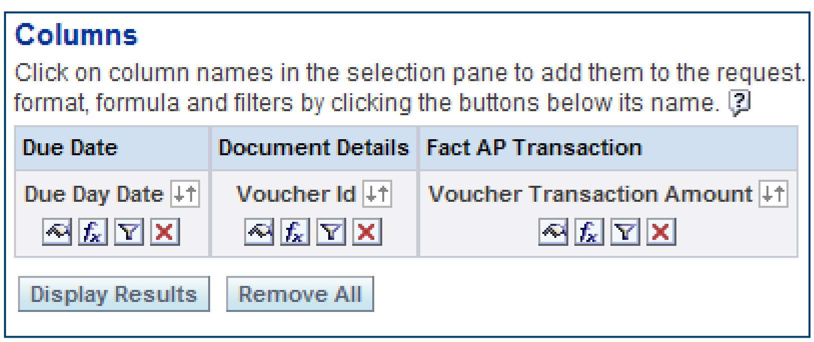
Scenario
In this scenario, your supervisor wants a simple request that limits the results in a report based on multiple criteria. You recognize that you will use these same criteria on multiple requests. Save the combined filter to your **My Filters** folder for use when building requests in this subject area.

Job Aid
Not Applicable

Instructions
Follow along with your instructor as he/she demonstrates how to use combined filters.

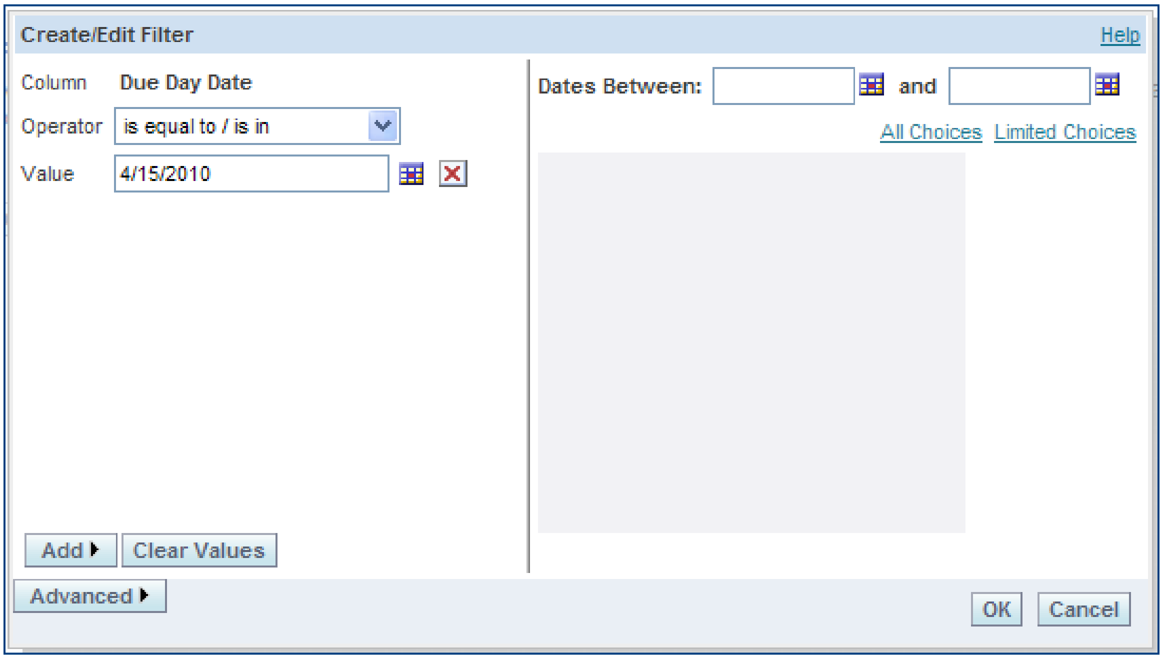
Detailed Steps

1. Click the **Answers** link to return to the start page for Answers
2. In your workspace, select the **FMS – AP – Vouchers and Payments** subject area
3. Expand the **Due Date** dimension and select the **Due Day Date** column
4. Expand the **Document Details** dimension and select the **Voucher ID** column
5. Expand the **Fact AP Transaction** fact and select the **Voucher Transaction Amount** column



6. Click the **Filter** button ( ) for the **Due Day Date** column

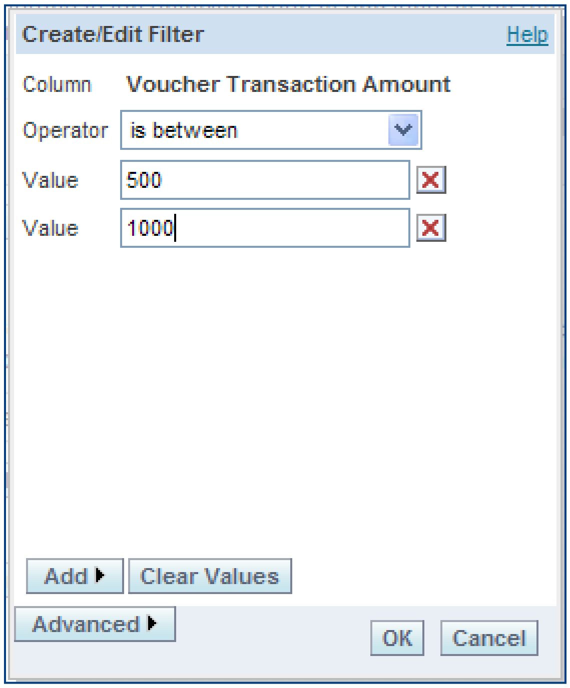
7. In the **Create/Edit Filter** window, accept the default of "**is equal to / is in**" in the **Operator** field and set the **Value** field to "**4/15/10**". This limits your results to only vouchers due on 4/15/2010.



8. Click the **OK** button

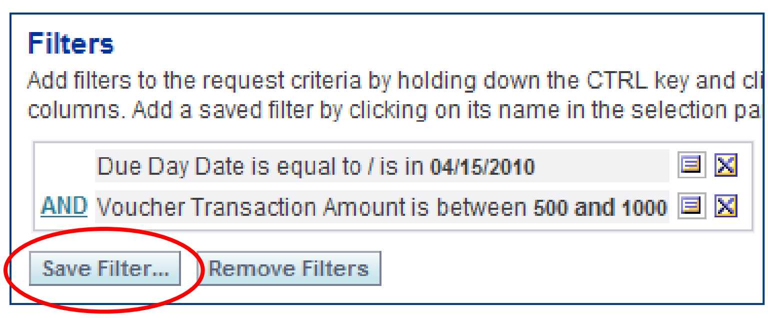
9. Click the **Filter** button () for the **Voucher Transaction Amount** column to limit the results further by the amount of the voucher

10. In the **Create/Edit Filter** window, set the **Operator** field to "**is between**" and set the **Value** fields to "**500**" and "**1000**". Adding this second filter further limits your results to only vouchers that are between the amounts of $500 and $1000.



11. Click the **OK** button

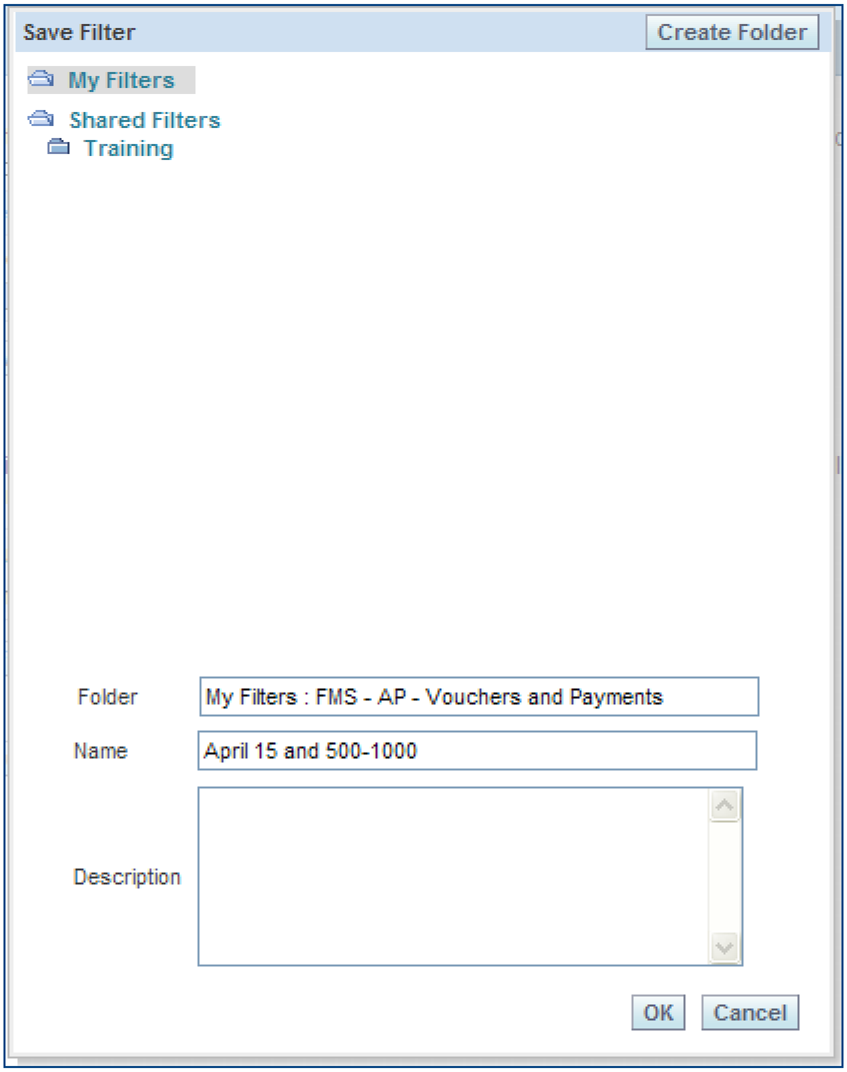
12. Notice that the combination of these two filters is shown in the **Filters** section of the workspace. Your results will now be limited to vouchers that are due on 4/15/10 **AND** between the amounts of 500 and 1000. Click the **Save Filter…** button.



13. In the **Save Filter** window, select the **My Filters** folder structure so the "**My Filters : FMS - AP - Vouchers and Payments**" label appears in the **Folder** field

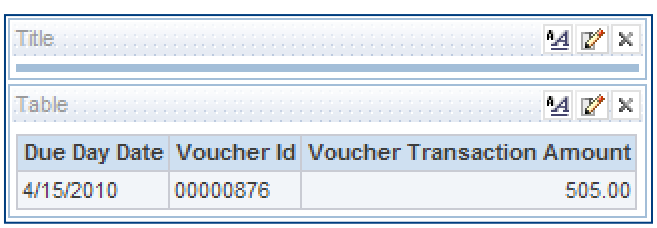
14. Click in the **Name** field and enter "**April 15 and 500-1000**"

Note: Be sure to save the filter for use on other requests from the same subject area.



15. Click the **OK** button

16. Click the **Results** tab. Notice that only one voucher had the transaction date of 4/15/10 and was between 500 and 1000 dollars.



Activity 9 - Challenge: Creating and Formatting Requests

Scenario

In this scenario, you have been asked by one of the managers that you support to create a monthly voucher amount report. The report should be sorted in ascending order by date with a prominent header for the Vendor column. Additionally, the report should also have the transaction amount formatted as currency and include the dollar symbol, show amounts to two (2) decimal places, and use the 1000s separator.

Job Aid

Not Applicable

Instructions

Use the appropriate steps from the previous Instructor led walkthroughs to complete the challenge scenario. **Tip:** This challenge puts together steps from the previous activities. Refer back to the previous activities if you want a picture reminder of where to click.

Detailed Steps

1. Click the **Oracle Answers** header in the selection pane to return to the start page for Answers
2. In your workspace, select the **FMS – AP – Vouchers and Payments** subject area
3. Expand the **Supplier** dimension and select the **Supplier Desc** column
4. Expand the **Due Date** dimension and select the **Due Day Date** column
5. Expand the **Document Details** dimension and select the **Voucher Id** column
6. Expand the **Fact AP Transaction** fact and select the **Voucher Transaction Amount** column
7. Click on the **Filter** button () in the **Due Day Date** column
8. Change the **Operator** field to “is between”
9. Enter the begin and end dates for April, 2010 in the **Value** fields to limit the results in this column to the month of April, 2010
10. Click the **OK** button

11. Click the **Order By** button () on the **Due Day Date** column so that it is pointing up. This indicates that the vouchers will be sorted in ascending order by the **Due Day Date** field.
12. Click the **Display Results** button
13. Change the view from the **Compound Layout** view to the **Table** view
14. Click the **Totals** button () above the **Due Day Date** column to add totals of the voucher transaction amount by date to the table
15. Click the **Totals** button () on the header toolbar to add a grand total of the voucher transaction amount to the table
16. Click the **Column Properties** button () for the **Supplier Desc** column
17. On the **Style** tab, change the font for this column to **Arial, 20,** and **Bold**. Then, set the **Vertical Alignment** for the cell to **Top**.
18. Click the **OK** button. Notice your changes are automatically applied to the results.
19. Choose the **Column Properties** button () for the **Voucher Transaction Amount** column
20. Click the **Data Format** tab
21. Click the **Override Default Data Format** checkbox to make the remaining fields on the page available for changes
22. Change the **Treat Number As** drop-down to "**Currency**", **Currency Symbol** drop-down to "**$**", and **Decimal Places** drop-down to "**2**". Then, select the **Use 1000's Separator** checkbox.
23. Click the **OK** button. Notice your changes are automatically applied to the results.
24. Feel free to "play" with additional settings if you are waiting for others to complete this activity

Activity 10 - Walkthrough: Modifying Dashboards

Scenario 1
In this scenario, you are modifying your blank **My Dashboard** dashboard. Use existing requests that you have created in class to modify the default page.

Scenario 2
After adding content to your **My Dashboard** dashboard, add an additional page to the dashboard and insert a shortcut to your **My Folders** folder.

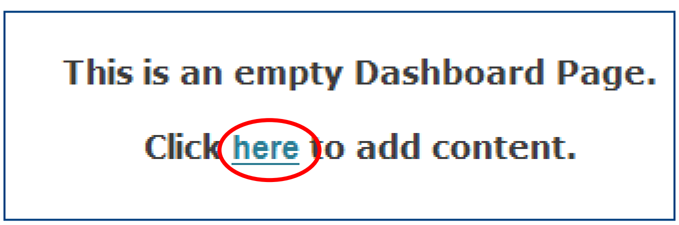
Scenario 3
On the second page of your **My Dashboard** dashboard, add an image that will open a request when clicked from your dashboard.

Job Aid
Not Applicable

Instructions
Follow along with your instructor as he/she demonstrates how to modify a dashboard.

Detailed Steps – Scenario 1: Modifying Your Empty Dashboard Page

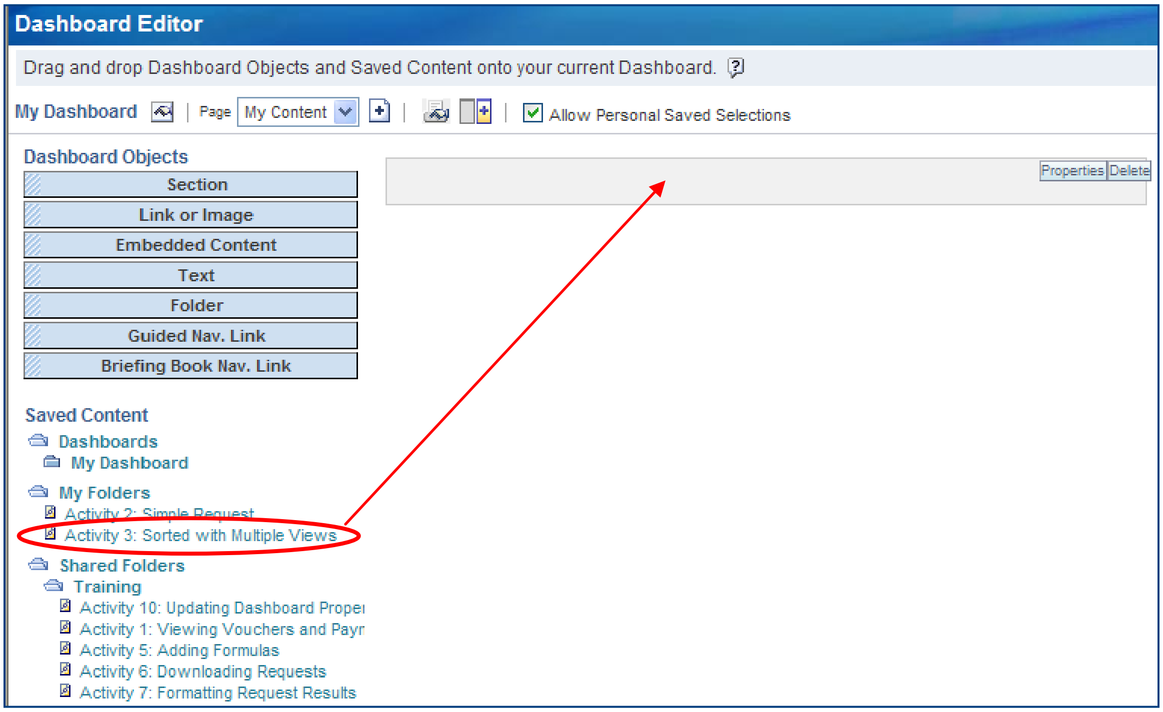
1. Click on the **Dashboards** link to view your empty dashboard page
2. Click the **here** link from the empty **Dashboard Page** to add content to your dashboard



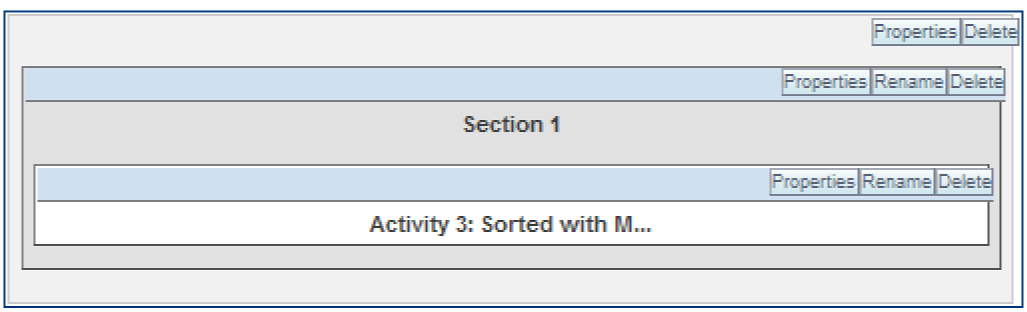
3. Locate and expand the **My Folders** structure

4. Drag the request titled: **Activity 3: Sorted with Multiple Views** onto the gray layout area

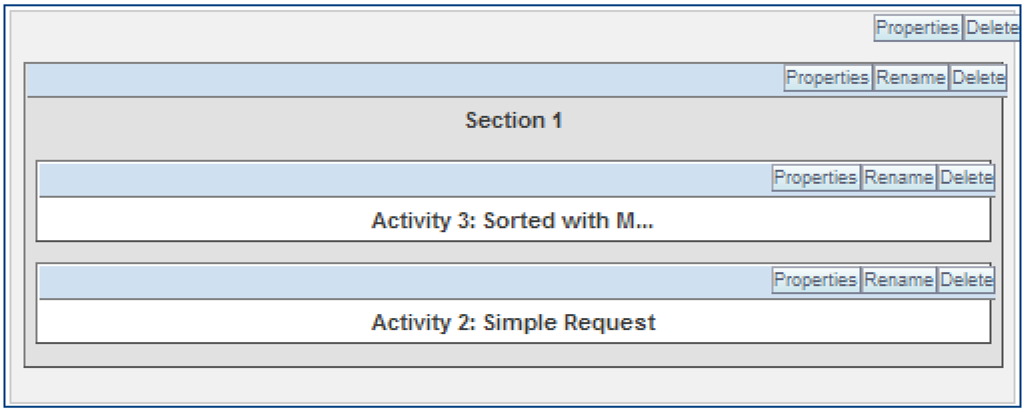
   Note: This area highlights in dark blue when you have reached a place where you can drop the request.



5. A section is automatically added to your dashboard that contains the request

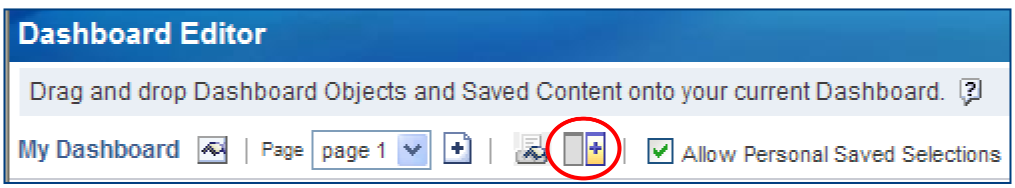


6. Drag and drop **Activity 2: Simple Request** to the layout area. Notice that you can drop Activity 2: Simple Request above or below Activity 3: Sorted with Multiple Views. For this scenario, drop the Activity 2: Simple Request below Activity 3: Sorted with Multiple Views.



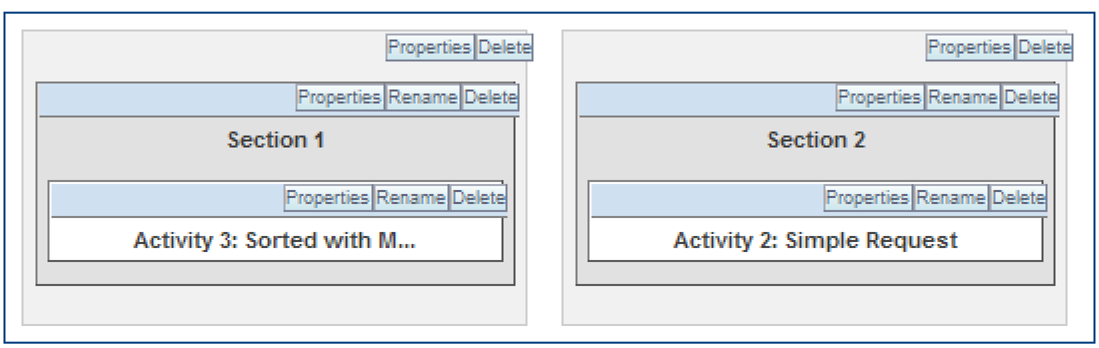
Note: Since both of these requests are in a single section, they will display one right under the other on your **My Dashboard** page.

7. To have the requests display side by side, you need to add another column to the dashboard. Click on the **Add Column** button ( ) to insert a new layout area so that you can view your requests side-by-side.



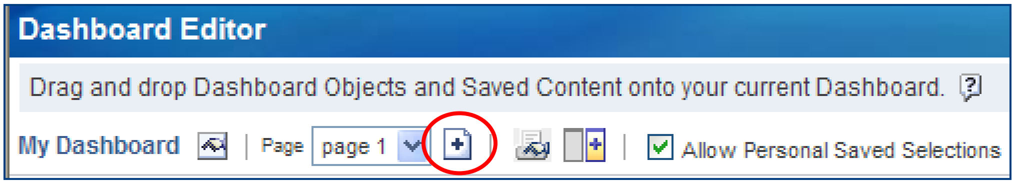
8. Drag the **Activity 2: Simple Request** object to the new layout area. Remember that the available drop areas highlight in dark blue. When you drop Activity 2: Simple Request in the new column, a new section is automatically created for the object.

   Tip: Use the blue header as your place to click and drag

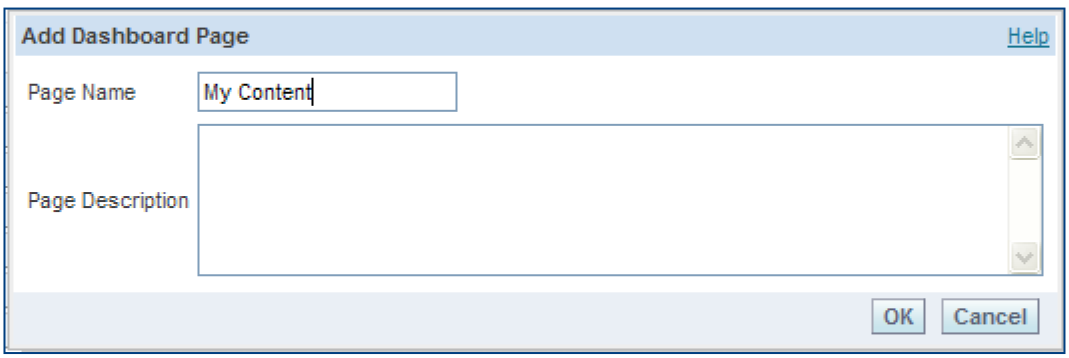


Detailed Steps – Scenario 2: Adding Pages to Your Dashboard

9. Click the **Add New Page** button ( )

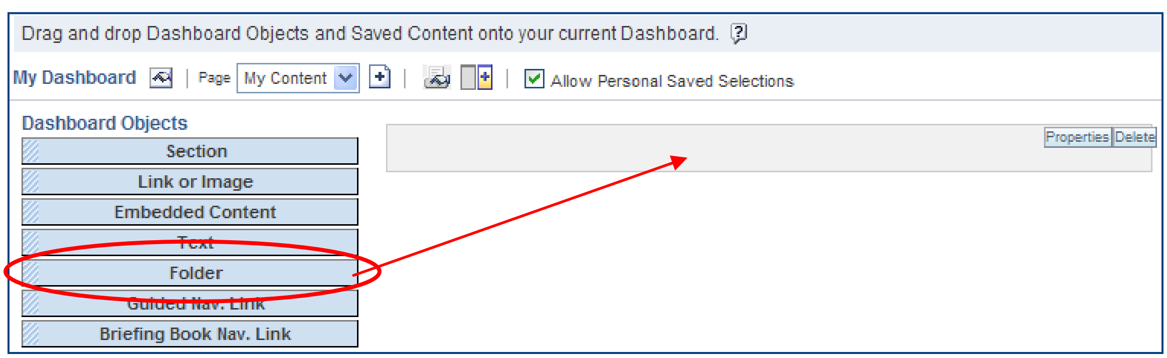


10. In the **Add Dashboard Page** window, enter "**My Content**" in the **Page Name** field

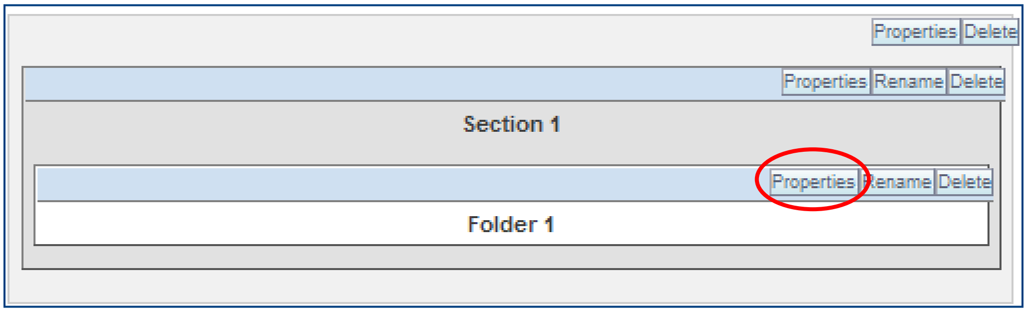


11. Click the **OK** button

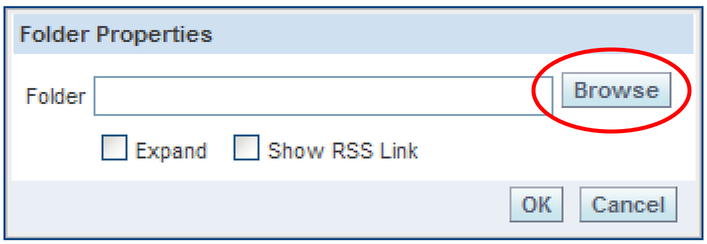
12. On the new page, add a link to the requests that are stored in the **My Folders** section of **Answers**. Drag the **Folder** object to the layout area.



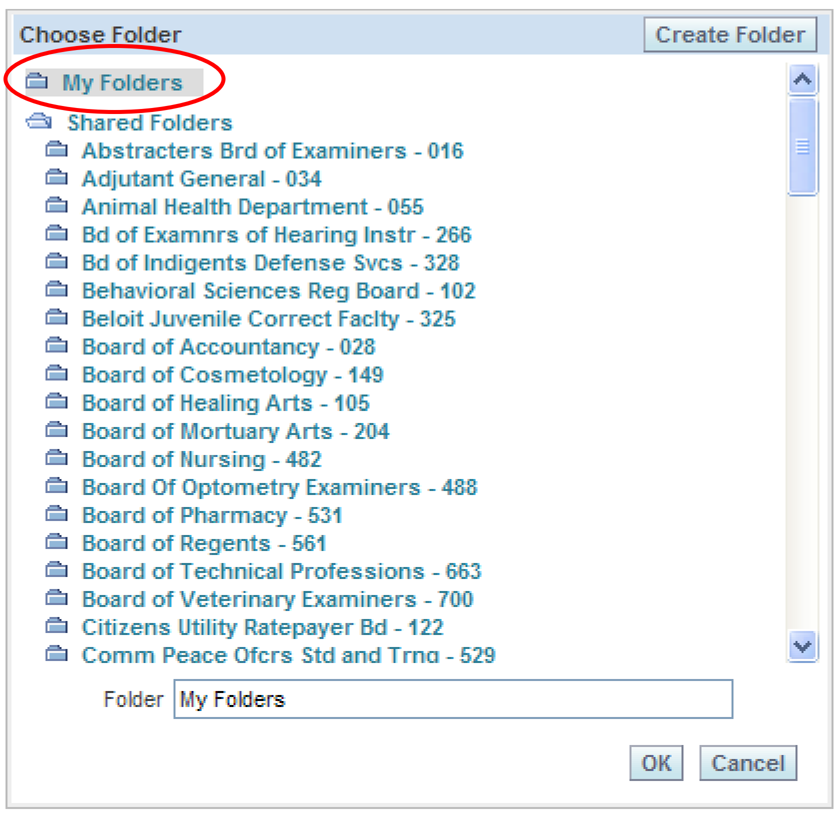
13. Click the **Properties** button for **Folder 1**



14. In the **Folder Properties** window, click the **Browse** button

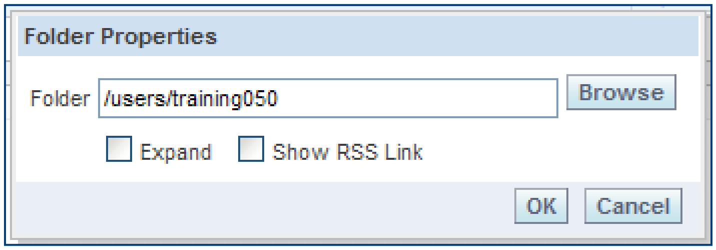


15. In the **Choose Folder** window, select the **My Folders** folder



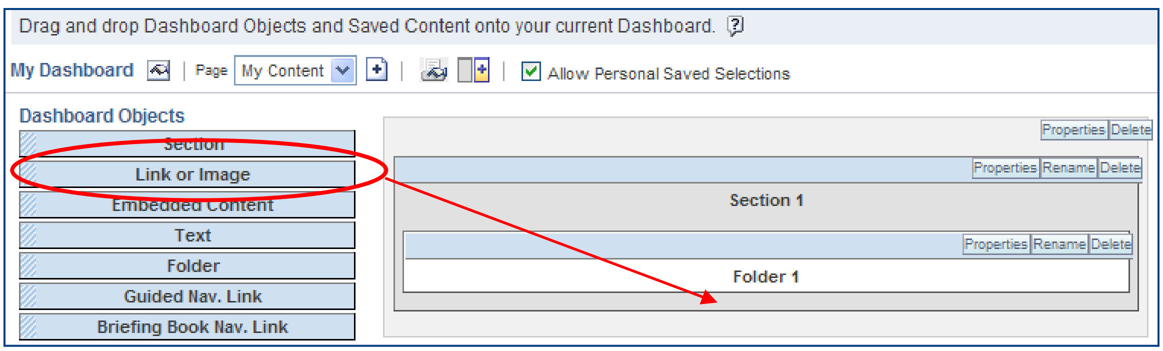
16. Click the **OK** button

17. In the **Folder Properties** window, notice that a folder path is displayed that shows your User ID for the data warehouse training environment. Click the **OK** button to confirm the folder you have selected.

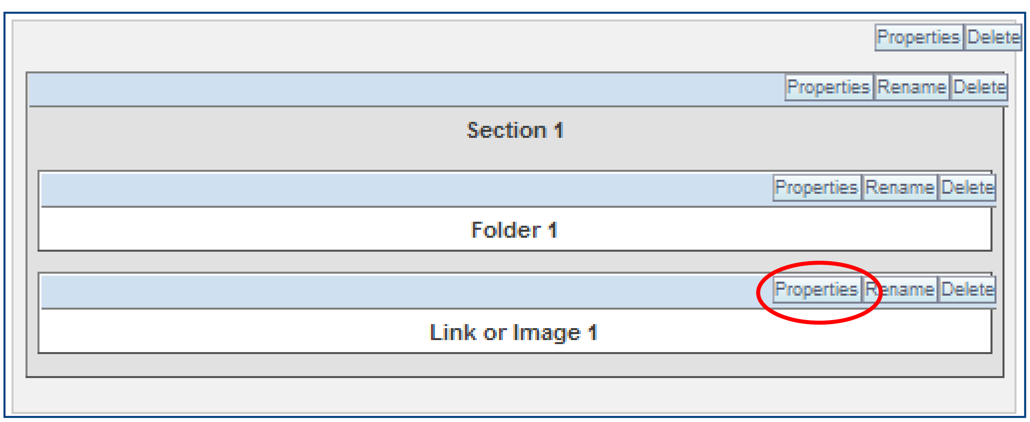


Detailed Steps – Scenario 3: Adding an Image to your Dashboard

18. Add an image from web to use as an icon on your dashboard. Clicking the image will open an existing request you have created. Drag the **Link or Image** object to the layout area and drop it under the **Folder** object within **Section 1**.



19. Click the **Properties** button for the **Link or Image 1** object



20. In the **Link or Image Properties** window, set the **Destination** radio button to the **Request or Dashboard** option

21. Use the **Browse** button to select **Activity 7: Formatting Request Results**

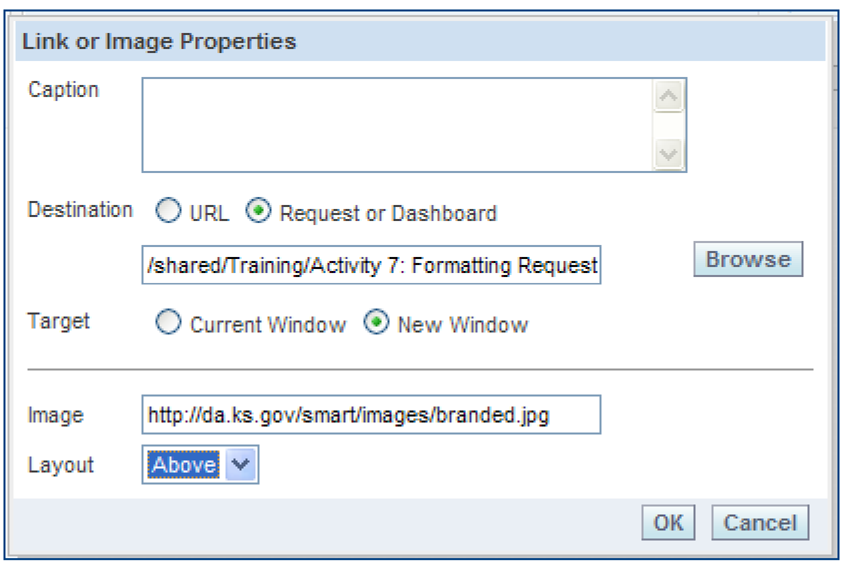
    Hint: Activity 7: Formatting Request Results is in the Training folder within the Shared Folders folder structure.

22. Set the **Target** option to **New Window** so that your request will display in a new window when the image is clicked

23. In the **Image** path, enter **http://da.ks.gov/smart/images/branded.jpg**.

    Note: Only images already stored on a web server can be used. Due to security settings, images cannot be uploaded. Be sure you are linking to an image you own or govern. Otherwise, it could be lost from your dashboard when someone else makes an update.

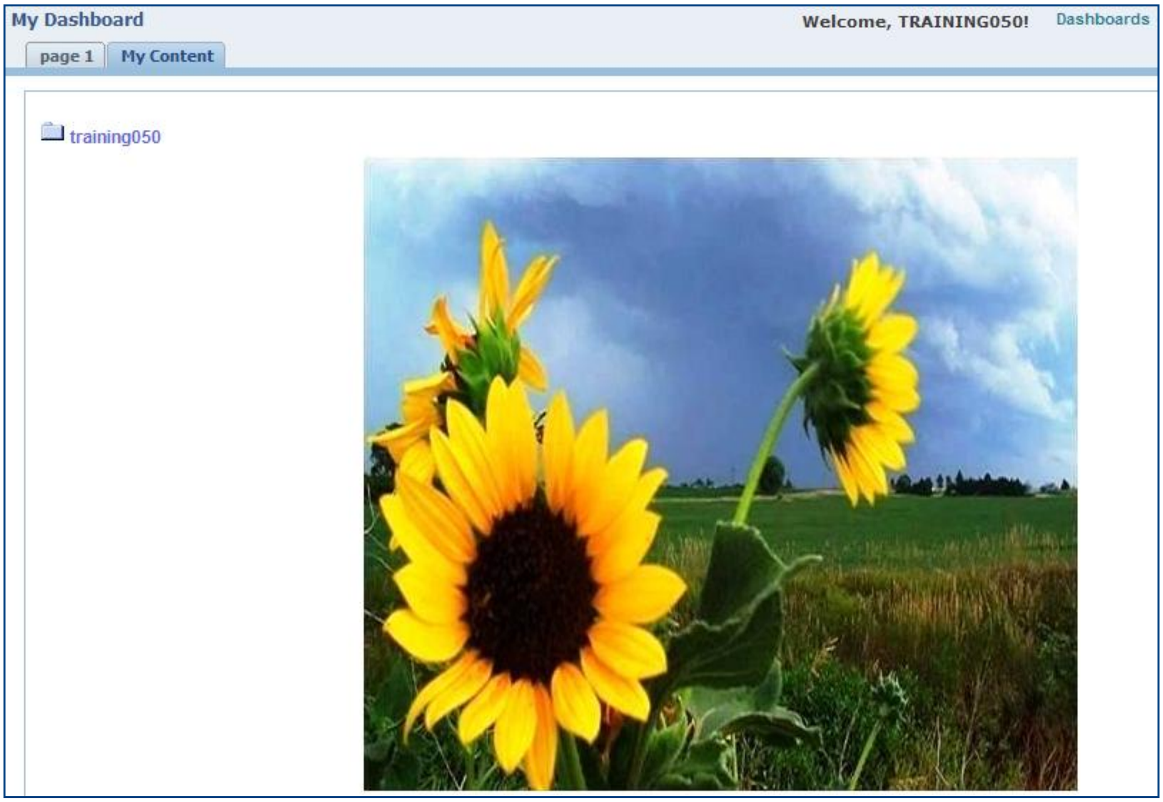
24. Set the **Layout** drop-down to **Above**



25. Click the **OK** button.

26. Click the **Save** button on the **Dashboard Editor** page to view your updated dashboard. Notice that the image is displayed inside the same section as your link to your My Folder structure.

    Note: If you see a **Security Information** pop-up window warning you that "This page contains both secure and nonsecure items", click the **Yes** button to continue.



Activity 11 - Walkthrough: Updating Dashboard Pages

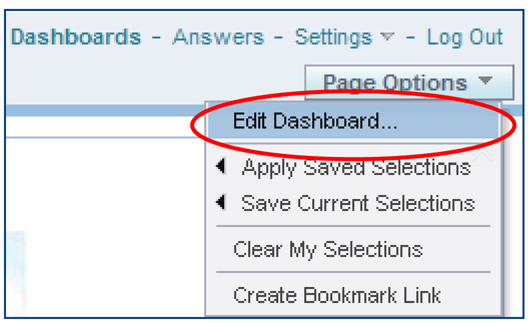
Scenario
In this scenario, you have decided to rename the default page on your dashboard. Open your **My Dashboards** dashboard and change the name of the dashboard page.

Job Aid
Not Applicable

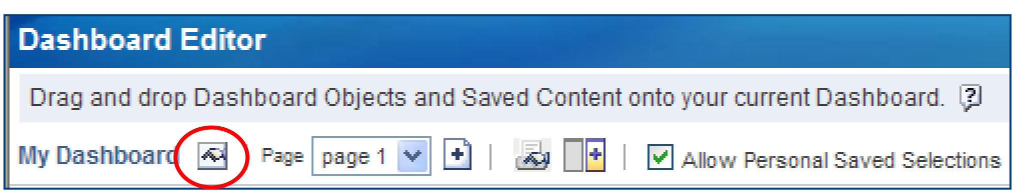
Instructions
Follow along with your instructor as he/she demonstrates how to update dashboard properties.

Detailed Steps

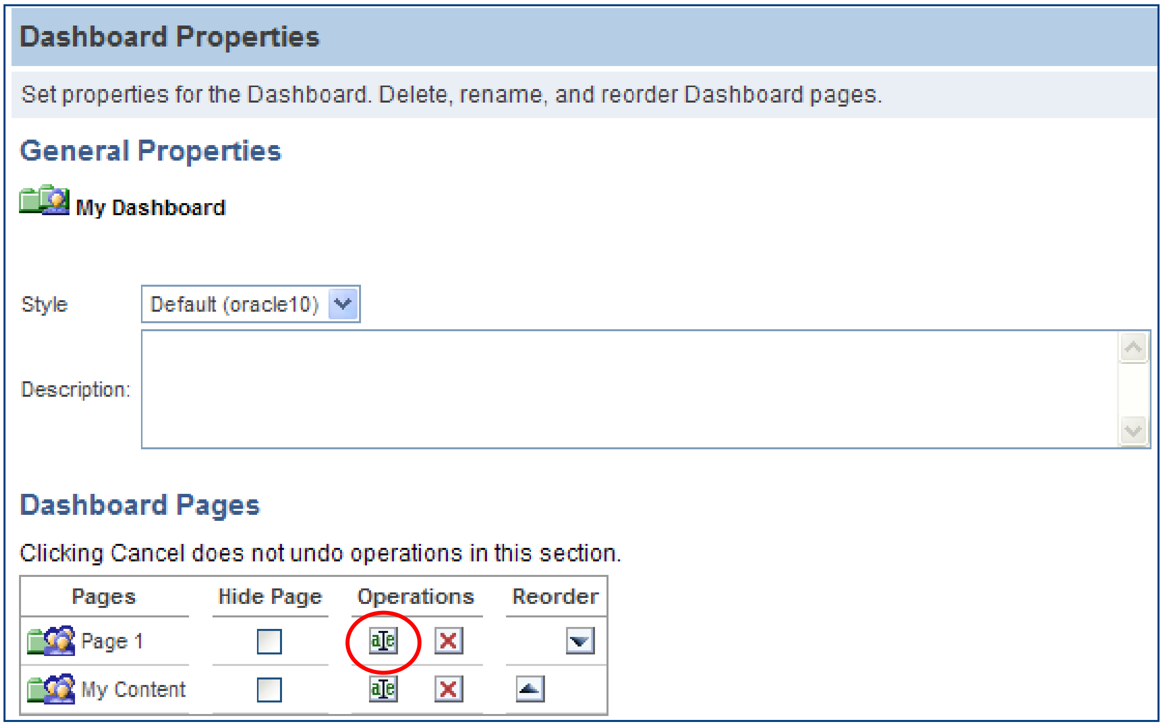
1. Click the **Dashboards** link to view your dashboard
2. Click the **Page Options** button and choose **Edit Dashboard** option from the drop-down list



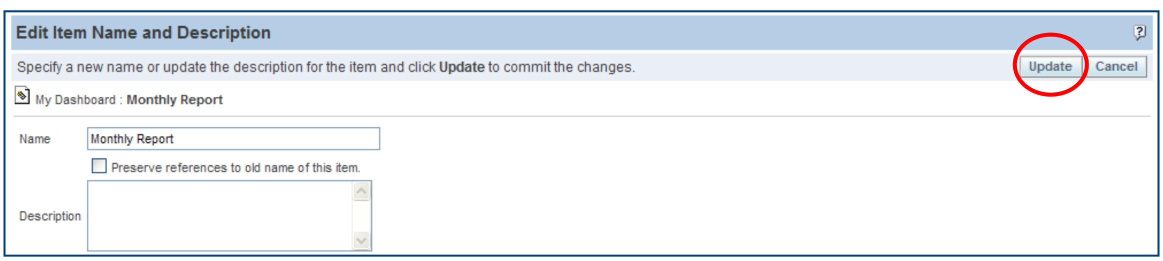
3. Click the **Page** drop-down list and choose the "**page 1**" option
4. Click the **Properties** button ( ) on the **Dashboard** toolbar



5. Click the **Rename** button ( ) under the **Operations** column in the **Page 1** row

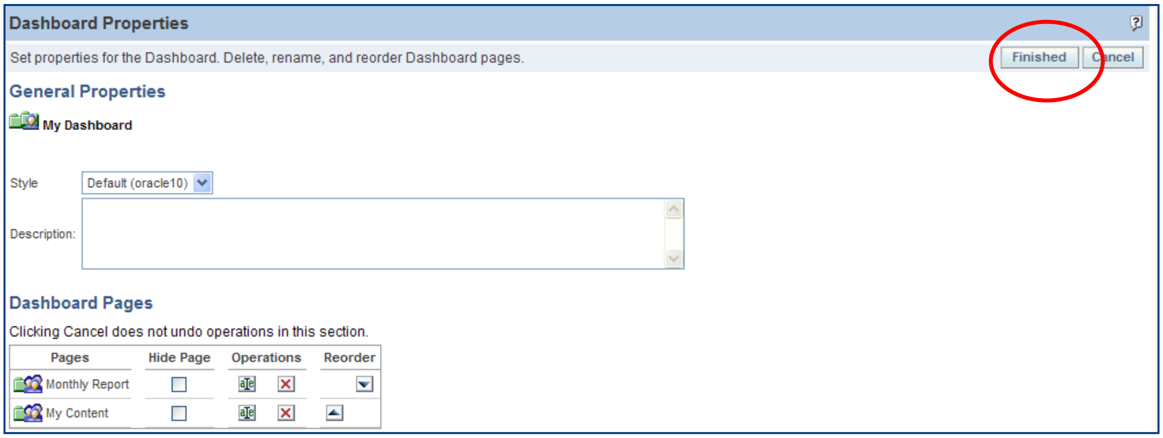


6. On the **Edit Item Name and Description** page, highlight "**page 1**" in the **Name** field and type "**Monthly Report**"

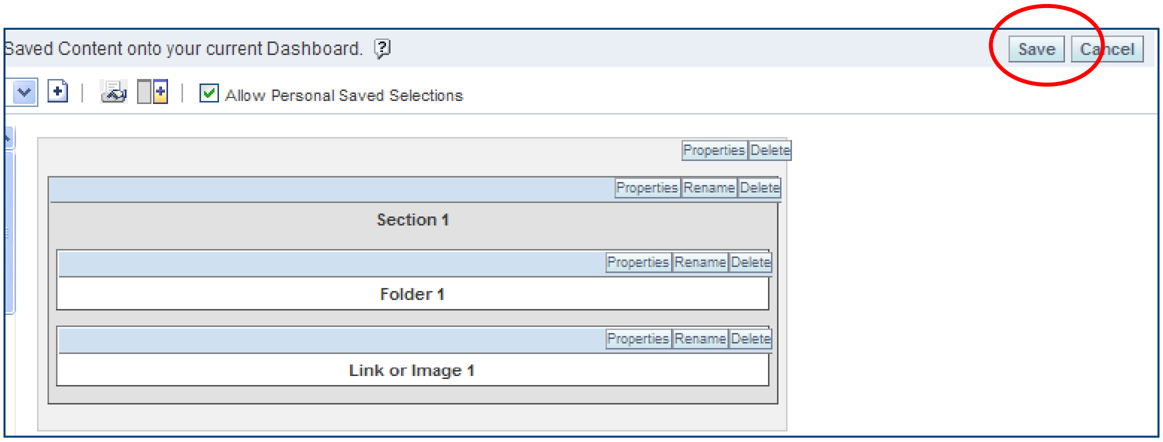


7. Click the **Update** button

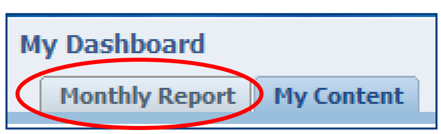
8. Notice the name under the **Pages** column changes from “page 1” to “Monthly Report”. Click the **Finished** button.



9. Click the **Save** button to review your changes



10. Notice the name of your dashboard page has changed



Activity 12 - Walkthrough: Creating Compound Layouts

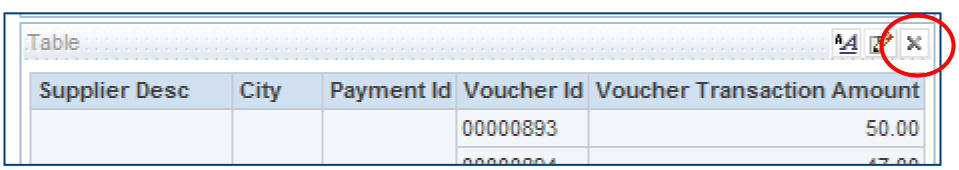
Scenario
In this scenario, you have spent several weeks getting comfortable with the subject areas and data for your agency. You are ready to create some more advanced views of your request results, including adding titles and narrative to dashboard pages.

Job Aid
Not Applicable

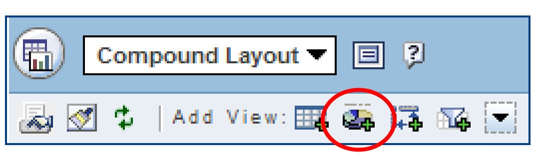
Instructions
Follow along with your instructor as he/she demonstrates how to add titles, narrative text, and a view selector to a request and then display it as your dashboard page.

Detailed Steps

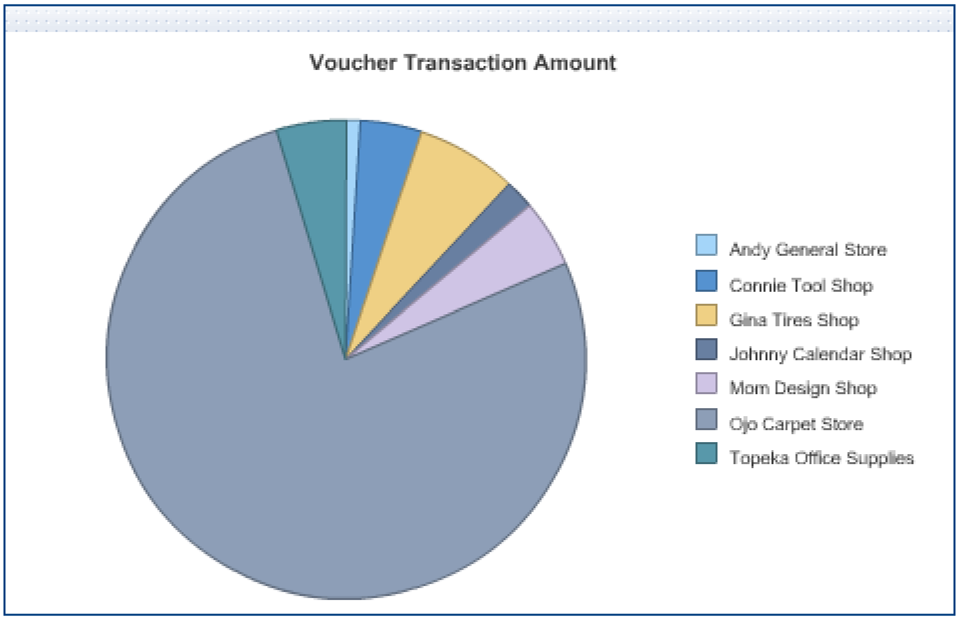
1. Click the **Answers** link to return to the start page for Answers
2. Locate and expand the **Training** folder in the selection pane under the **Shared Folders** structure
3. Click the request titled “**Activity 5: Adding Formulas**”
4. Click the **Modify** button
5. Click the **Results** tab to display the results in **Compound Layout** view
6. Since we are adding a view selector, we can remove the **Table** view. Click the **Delete** button ( ) on the **Table** view to remove the table from the layout



7. Click the **Chart** button ( ) to draw a chart of the results

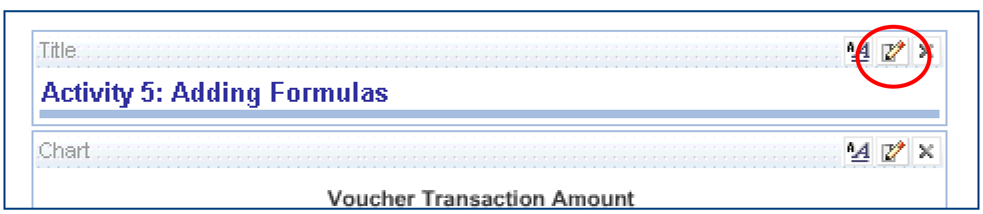


8. Click the **Graph** drop-down list and choose the **Pie** option.



9. Click the **OK** button

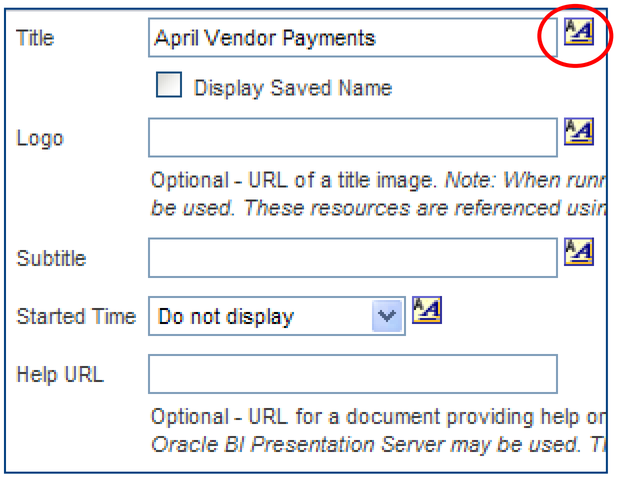
10. You should now have a **Title** view at the top and a **Chart** view underneath. To make a different title, click the **Edit View** button ( ) for the **Title** view.



11. Enter "**April Vendor Payments**" in the **Title** field

12. Deselect the **Display Saved Name** checkbox so that the name of the request is no longer displayed as the title

13. Click the **Format Value** button ( ) next to the **Title** field

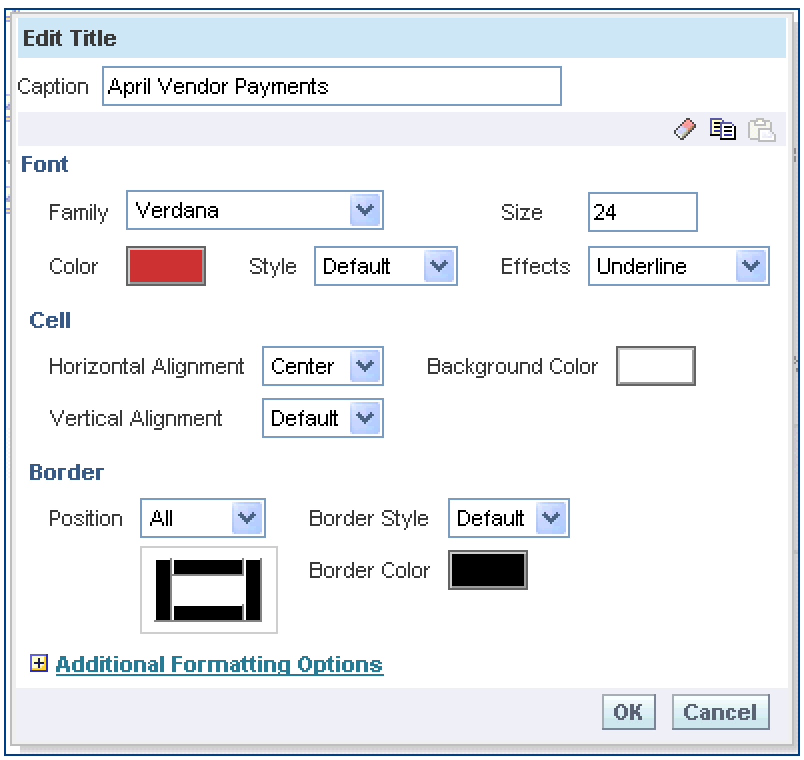


14. In the **Edit Title** window, set the **Family** field to “**Verdana**”
15. Set the **Size** field to “**24**”
16. Set the **Color** field to “**red**”

    Hint: #FF0000 is the color code for red.

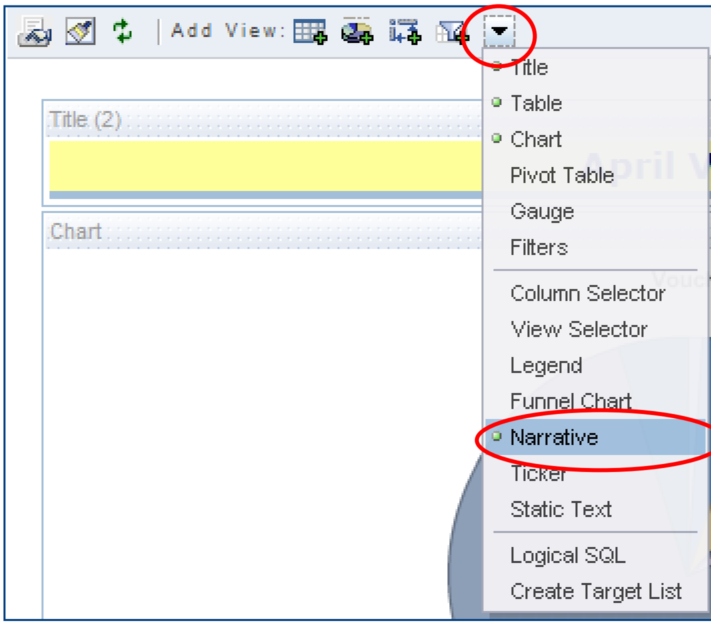
17. Click the **OK** button to close the **Color Selector** window.
18. Set the **Effects** field to “**Underline**”
19. Set the **Horizontal Alignment** field to “**Center**”
20. Set the **Position** field to “**All**”
21. Set the **Border Color** to “**black**”

    Hint: #000000 is the color code for black.



22. Click the **OK** button to close the **Color Selector** window
23. Click the **OK** button to close the **Edit Title** window
24. Click the **OK** button on the **Results** tab

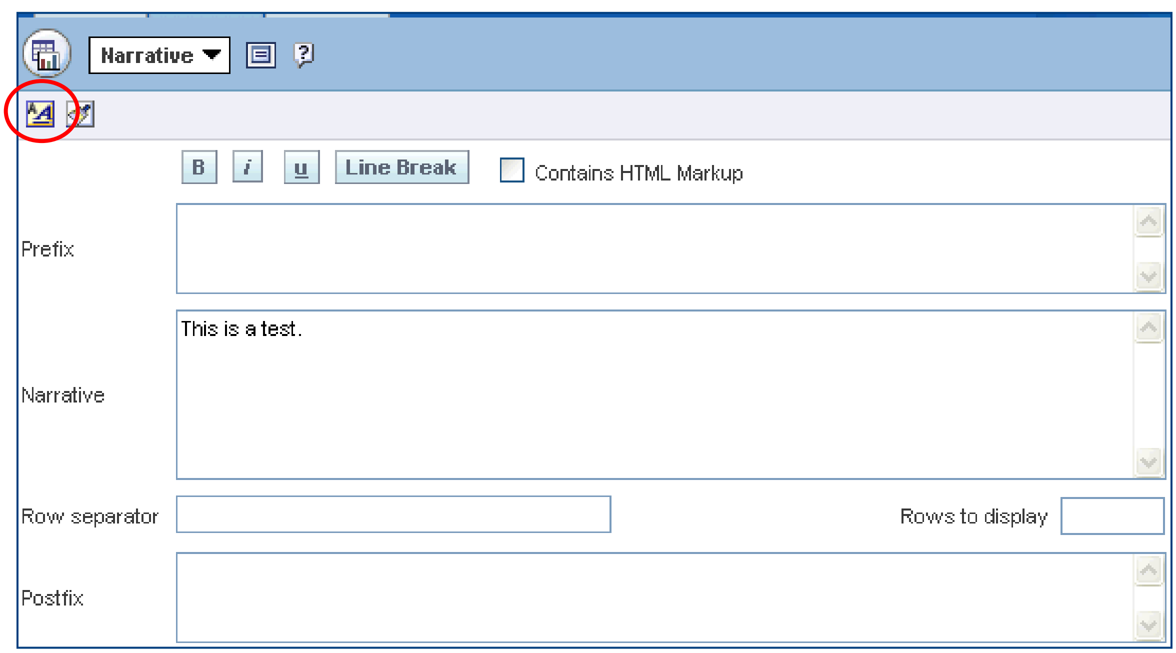
25. Click the **Add View** button and select **Narrative** from the drop-down list



26. Type a message in the **Narrative** field to display on your dashboard

Hint: Use the narrative to describe your compound view.

27. Click the **Format Value** button ( ) in the upper left corner

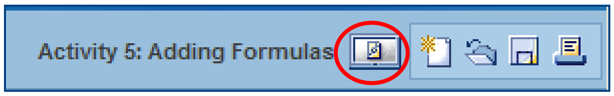


28. Choose fonts, colors, and sizes of your choice for the text. Then, click the **OK** button.

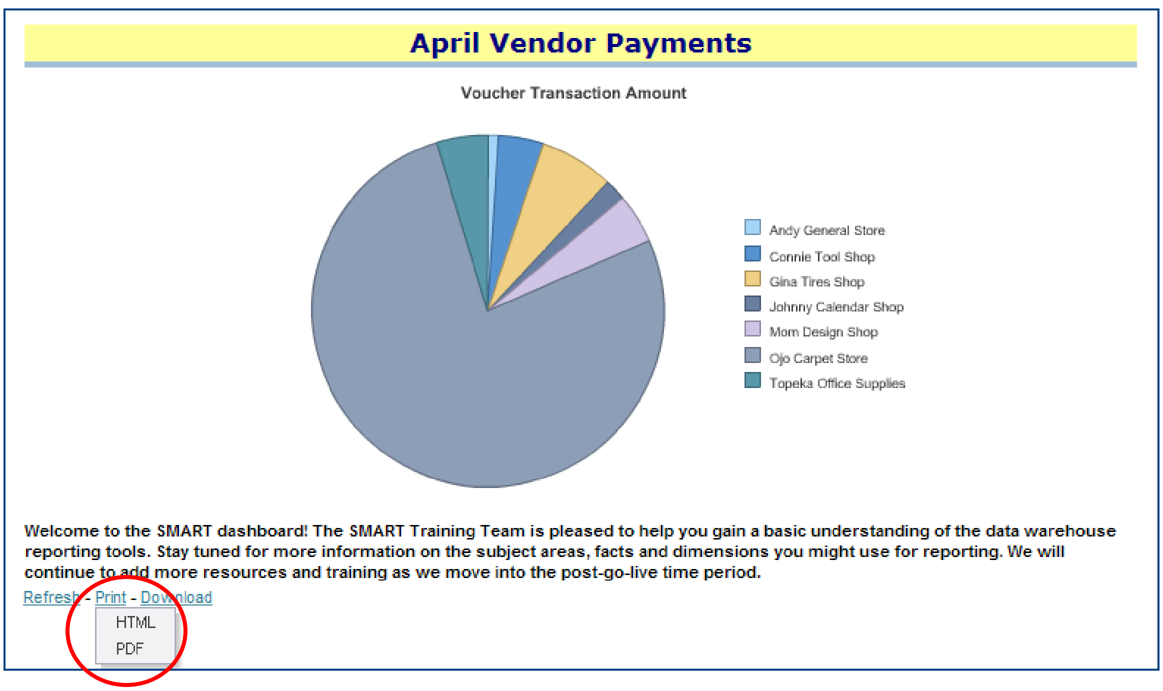
29. Enter "**1**" in the **Rows to Display** field

30. Click the **OK** button on the **Results** tab

31. Click the **Show how results will look on a Dashboard** button ( ) to view your layout as a dashboard



32. A preview of the dashboard opens in a new window. Notice that you can use the **Print** link to print to "**HTML**" or to "**PDF**". You also have the same download options on the dashboard view as you do on a request result.



33. Close the additional browser window.

34. Click the **Save** button ( )

35. In the **Save Request** window, select the **My Folders** folder structure

36. Enter "**Activity 12: Creating Compound Layouts**" in the **Name Field**

37. Click the **OK** button

38. Click the **Add Views** button and select **View Selector** from the drop-down list

39. Enter “**Please Choose a Display Option**” in the **Caption** field

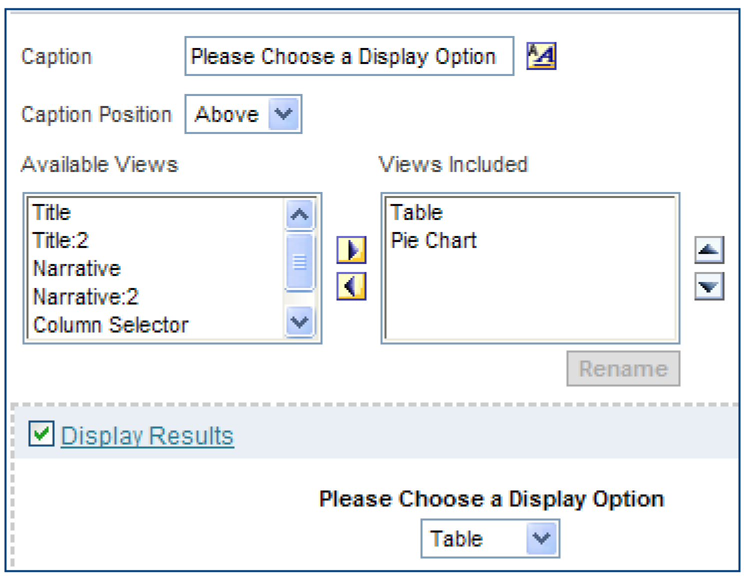
40. Choose the **Above** option from the drop-down list in the **Caption Position** field

41. Select **Table** from the **Available Views** field and click the **right arrow** () to move **Table** to the **Views Included** field

42. Select **Chart** from the **Available View** field and click the **right arrow** () to move **Chart** to the **Views Included** field

43. In the **Views Included** field, click on the **Chart** view and then click the **Rename** button.

44. Add the word “**Pie**” before “**Chart**” so that you know what type of chart you are choosing

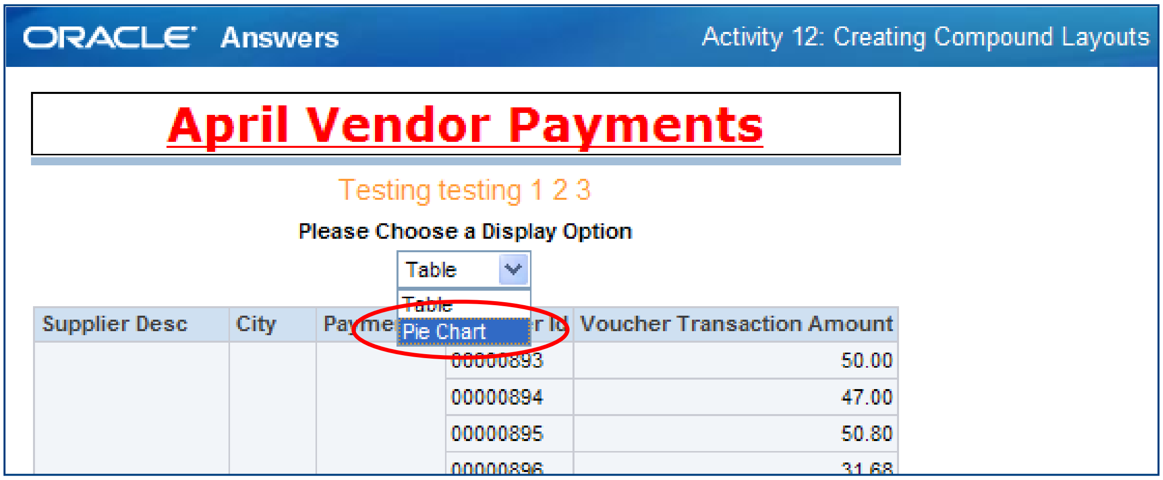


45. Click the **OK** button to return to the **Compound Layout** view

46. Click the **Delete** button () on the **Chart** view so you only see the view you choose with the **View Selector**

47. Click the **Show how results will look on a Dashboard** button () to view your layout as a dashboard.

48. Use the **View Selector** to change the view from **Table** to **Pie Chart**



49. Close the additional browser window

50. Click the **Save** button

51. Click the **OK** button to save with the same name

52. In the **Save…** pop-up, click the **Yes** button to replace the existing request.

53. Click the **Dashboards** link

54. Click the click the **Page Options** button and choose the **Edit Dashboard** option from the drop-down list

55. Click the **Add Dashboard Page** button ( ) and enter "**End of Class**" in the **Page Name** field

56. Click the **OK** button in the **Add Dashboard Page** window

57. Expand the **My Folders** folder structure and drag the request titled "**Activity 12: Creating Compound Layouts**" onto the gray layout area

58. Click the **Save** button.

59. **Congratulations!** You have successfully completed the **DARP301: Ad Hoc Business Intelligence Reporting** course!